International Perspectives on Education

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BCES Conference Books

Volume 10

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Bulgarian Comparative Education Society

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Foreword

KAREN L. BIRAIMAH

REMEMBERING THE PAST – ANTICIPATING THE FUTURE

Reflections on the BCES's Jubilee Conference

It was a beautiful, crisp fall morning when we landed in Sofia. It was my first trip to Bulgaria, and my sister's first trip beyond North America. We were met at the airport by two of Professor Popov's graduate students. The decade-long adventure had begun; culminating in this year's Bulgarian Comparative Education Society's (BCES) Jubilee Annual Conference on *International Perspectives on Education*. Born out of a tradition of impeccable planning, warm hospitality, and a desire to contribute to the global comparative education community, Professor Popov and his colleagues at Sofia University worked tirelessly to plan a series of annual conferences, each exceeding the achievements of its predecessor. Building upon a small base of diverse scholars, that first BCES *International Conference on Comparative Education in Teacher Training* in 2002 was a unique blend of seminar-style collaborative learning and family-style cultural immersion events. Launched by a splendid reception, those first attendees were introduced to a level of hospitality simply unrivaled by other conferences.

Though I've attended a myriad of professional conferences, the BCES conference became a unique introduction to the people and cultures of Bulgaria, and to an academic format that modeled a truly inclusive learning community. During those early days we were more like a family than a group of scholars who just happened to come together for a conference. This small group of learners shared knowledge, research and perspectives in seminars that valued the thoughts and lived experiences of every participant, while providing opportunities for us to get to know our colleagues as unique individuals. We also enjoyed unparalleled access to Professor Popov (and occasionally to his family as well), an almost unheard of practice by program organizers of "other" conferences. We explored the history and culture of Bulgaria through shared tours, dinners, and walks about Sofia and Plovdiv. Some of us even shared a family dinner at the Popov's home. What a rare treat!

During those first few conferences, attendees often boarded buses together to explore Bulgaria from a collective perspective. These adventures, which introduced us to a slice of Bulgaria while building camaraderie, will remain etched in my memory. Of course there were fabulous "photo opportunities" of Roman ruins (which continue to take the breath away from North Americans who view history in centuries, not millennia), and the unparalleled beauty of the Bulgarian countryside.

But perhaps more importantly, there were those small moments in time when we enjoyed the company of our colleagues, a time when we began to view them as fellow explorers of the human condition, rather than presenters at yet another conference. I will always remember that moment in Plovdiv when our walking tour was halted to enable a colleague to leap into a phone booth to check on the welfare of his family back home; the coffee shared at sidewalk cafes when we simply couldn't take one more step without a caffeine infusion; or the heartwarming moment when we all lifted our glasses to celebrate a wedding anniversary. Precious moments shared not by colleagues, but by friends.

The overwhelming success of those initial conferences led to the inevitable. We had to share our priceless and well-kept secret with an ever increasing community of scholars. And with that growth came many challenges, as well as opportunities as the BCES conference adjusted to meet a growing "economy of size". As conference attendance grew the program and format became more complex and formal, and it began to reflect that overly familiar conference formula we had all experienced elsewhere, but had secretly hoped BCES would ignore – forever! That rather selfish desire was not fulfilled, and we began to gain an ever expanding circle of colleagues. Lost was that intimate community of scholars who had learned as much from their shared cultural travel and immersion activities as from their academic sessions; and lost was that cozy intellectual environment which was gradually replaced by one that included a much broader and robust conference setting. Not a bad thing; yet a sad thing.

Yes, the time had clearly come to share our treasure with others, and a painful yet necessary metamorphosis occurred – much like those bittersweet moments when a parent realizes that their child must move on to a broader world and a more independent life. Success often brings a moment of sadness when we acknowledge that a fond memory is just that. Likewise, those earlier BCES conferences have, by necessity, faded into our collective memories, being replaced by a more mature academic endeavor, even more capable of contributing to comparative education in the globalized world. As this occurs, my only wish is that these conferences will continue to include aspects of that warm, intensely personal, and rewarding past as they move forward into their next evolutionary stage.

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Editorial Preface

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AN ESTABLISHED CONFERENCE TRADITION

This volume contains papers submitted to the 10th Annual Conference of the Bulgarian Comparative Education Society, held in Kyustendil, Bulgaria, 12–15 June 2012. The overall goal of the 10th BCES conference is to facilitate discussion of different perspectives on international education providing a forum for scientific debate and constructive interaction in a multi cultural social environment such as Bulgaria.

This is a jubilee conference. **Ten** might not mean too much for large scholarly societies in other countries, especially in the Western world. However, for a small society like BCES **ten** means a lot. It means trust, international recognition, constant interest, well-developed academic cooperation, and the most important – it means an established conference tradition.

The BCES Conference Development

In the past ten years, the annual BCES conference has cultivated a platform for scholarly exchange and stimulating academic debates, discourses and ideas beyond disciplinary boundaries.

The 1st, 2nd and 3rd BCES conferences were strongly focused on Comparative Education and Teacher Training and on their pivotal issues in the light of globalization, internationalization and regionalization. From the 4th through to the 10th conference, as a result of the increasing interest in this forum, other fields such as, Education Policy; Reforms and School Leadership; Higher Education, Lifelong Learning and Social Inclusion; History of Education; Learning and Teaching Styles; Lisbon Goals and the Bologna Process; Child Psychology and Special Education – have permanently or sporadically been included in the conference programmes. Thus, year by year, the conference has increasingly integrated various fields in order to respond to participants' interests and to explore relations and connections across the traditionally established perimeters.

The annual BCES conference has not only succeeded in placing on the world map of Comparative Education a part of the world (South-East Europe) so far neglected by the global fraternity of Comparative Education scholars, located as they are mainly far away in the three nodes of North America, Western Europe and Hong Kong; but under the aegis of this conference, particularly Thematic Section 1 (which focuses on Comparative Education as a discipline and its place in teacher education), groundbreaking work in Comparative Education has been done with the publication of the volume *Comparative Education at Universities Worldwide* (Wolhuter, Popov, Manzon, Leutwyler, 2008), of which the third, expanded edition

will be launched in 2012. Furthermore, the equally momentous two volume encyclopedia of teacher education worldwide *International Handbook on Teacher Education World Wide, Volumes I & II* (Karras & Wolhuter, 2010) was conceived largely within this thematic section, and many of its authors were recruited from delegates of the 7th and 8th BCES conference. Another Comparative Education project on teacher images was hatched at the 9th conference, culminating in a book also to be launched at the 10th conference. Countless other projects were explored or promoted at these conferences, such as a textbook for a Comparative Education course at Mount Union University, Ohio, USA.

Besides the conference book, which enters its 10th volume this year and which provides a platform for conference participants to publish their scholarly work, the conference features additional events such as book launching, continuous professional development workshops and an international roundtable on higher education, lifelong learning and social inclusion.

As international dimensions have increasingly entered the national educational systems all over the world, the specific comparative perspective, as it is explicitly cultivated in the BCES conferences, has gained importance and relevance. The BCES contributes with its conferences, therefore, to an increasing awareness of international references and a better understanding of global transformations and their implications for different local contexts. Against this background, the BCES conferences have established a distinguished tradition of developing and elaborating a refined understanding of the complex interrelations and interdependences between historically and socio-culturally contextualized local situations and global developments.

The Bulgarian Comparative Education Society

The Bulgarian Comparative Education Society (BCES) was founded in Sofia in October 1991. Since March 1992 it has been a constituent member-society of the World Council of Comparative Education Societies (WCCES).

BCES is registered as a non-profit, non-governmental organization. It focuses on: organizing international conferences; doing comparative education studies; coordinating international research projects; supporting publications on problems of education; organizing study visits to Bulgaria for foreign students and teachers; publishing books on comparative and international education.

BCES topics of special interest are: comparative education as a university discipline; pre-service and in-service teacher training; education policy at international, national, regional and local level; new practices in preschool, primary and secondary education; reforms in higher education.

Organizing its annual conference is the BCES way of making itself an integral part of the international comparative education community. BCES has put Bulgaria on the global map of comparative education and this is attested to or reflected by the range of quality papers that the conference continues to attract to its thematic sections. As the annual conference enters its 10th year, it is hoped that participants will continue to make BCES conference relevant to global comparative education.

In 2011, BCES celebrated its 20th anniversary. Erwin H. Epstein, WCCES Past President, wrote in his message to BCES on that occasion (Epstein, 2011):

> Luckily, the comparative education world recognizes the work of Bulgarian comparativists by virtue of the vigorous activity of the Bulgarian Comparative Education Society, and especially the work of Nikolay Popov. Since its founding, that Society has made its presence felt by its meetings that have been open to all comparativists and by its energetic involvement in the World Council of Comparative Education Societies. When some other comparative education societies failed to live up to their World Council obligations, the BCES always conscientiously complied.

Other contributions that BCES has made to the field were attested to by Mark Bray, WCCES Past Secretary General and President, in a letter to BCES (Bray, 2011):

> Among the significant contributions that the BCES has made to the international arena has been the publication in English of a series of volumes on such themes as comparative education and teacher training, and on comparative education in universities worldwide. These stand as monuments in the field, and are evidence of the energy and commitment of a core group of BCES scholars working with international counterparts.

> In converse, the BCES played a very significant role when it translated into Bulgarian the 2003 book which emerged from the 11th World Congress of Comparative Education Societies held in Korea. That book, of which I was the editor, was entitled *Comparative Education: Continuing Traditions, New Challenges, and New Paradigms*. Bulgarian was the first of eight languages into which the book was translated.

> On a similar note, I recall that your chapter was among the first to be submitted for the book that was in due course entitled *Common Interests, Uncommon Goals: Histories of the World Council of Comparative Education Societies and its Members*.

This Year's Conference Theme

This year's theme, *International Perspectives on Education*, could not have been more appropriate for a forum that, to all intents and purposes, represents the hallmark of excellence in South-Eastern Europe. With the international dimension of this year's theme, it is envisaged that this 10th BCES will continue the tradition of facilitating international cooperation and information exchange for the development and advancement of comparative education, where the sharing of ideas and knowledge inspires, guides and promotes excellence in curricula, teaching and research.

As Alexander W. Wiseman writes in the Introduction to this volume (p. 17):

> International perspectives on education have been characterized both by tremendous growth and variety since those first travelers' tales. This ebb and flow of growth and rejuvenation is a natural cycle, but one that often causes uncertainty or questioning among

educators, scholars and professionals in the field. Debates ensue in any field about its future and what is best for it, but the future of international perspectives on education is especially contentious because it is fraught with disagreement about who has the power or authority to make system-wide educational change and how they will go about doing it globally, nationally, locally and even in individual classrooms and communities.

The future of international perspectives on education is determined, in part, by where international comparative education research comes from and what it represents. Emphases in international perspectives on education are traditionally on the phenomenon of policy borrowing and contextual differences. This suggests that the mechanisms for comparison and the professionalization of international comparative education study and influence are ripe for analysis. International comparative education research and study will continue to play a significant role in the development and reform of educational systems and schools worldwide.

BCES Conference Book, Volume 10, 2012

The volume consists of an introductory chapter by Alexander W. Wiseman and 65 papers written by 107 authors and grouped into five parts:
1) Comparative Education & History of Education (14 papers)
2) Pre-Service and In-Service Teacher Training (7 papers)
3) Education Policy, Reforms and School Leadership (12 papers)
4) Higher Education, Lifelong Learning and Social Inclusion (24 papers)
5) Learning and Teaching Styles (8 papers)

Special thanks to all authors of papers who contributed to Volume 10. It is hoped that this publication will be useful and interesting to a large circle of readers – students in education programmes, university and college staff, researchers, experts and administrators, school principals, education policy makers.

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Introduction

ALEXANDER W. WISEMAN

A FRAMEWORK FOR UNDERSTANDING INTERNATIONAL PERSPECTIVES ON EDUCATION

Abstract

International perspectives on education have existed since the first world travelers brought stories back from their travels abroad, but the ways these perspectives are presented and understood varies as much as the cultures and communities themselves. This introduction to international perspectives on education provides a framework, which relies on conceptual, comparative, problematized and cultural understandings of education, both within and across educational systems worldwide. Conceptually, international perspectives on education are framed by the dual elements of both globalization and contextualization. Within this broad framework, comparative perspectives of education worldwide are characterized by assumptions about educational access, accountability and achievement. Problematizing international perspectives on education requires recognition that many, if not most, perspectives fall along a sliding scale from acceptance of to resistance against the mass education model, which has become ubiquitous worldwide. Likewise, cultural understandings of education from international perspectives address both the culture embedded in local and native communities, but also a culture that has become endemic to the institution of education itself. This introduction to international perspectives on education concludes with a discussion of the possible futures for the international comparative study of education, and how topics and trends are both varied in their topics, but limited in their scope.

Introduction

The role that education plays worldwide is both breathtaking and conflicted. It is a tool for the development and emancipation of oppressed peoples and it is a tool for their enslavement. Education is a way to individually liberate minds and create opportunities for social, economic, and cultural development, and it is a way to monopolize opportunity and crush independence. And, not surprisingly, education varies between these extremes. This is the dilemma of international perspectives and the complexity of education as a global phenomenon.

Understanding international perspectives on education requires an examination of education both *across* and *within* systems, cultures, and communities. As a start, consider the two quotations below. These quotes from Nelson Mandela and Paulo Friere give us two voices both emanating from within specific contexts. Each of these quotes comes from a revolutionary thinker and leader. Each of these thinkers

was passionate about education and saw both its potential and its pitfalls. And, each of these perspectives is in many ways in complete contrast to the other. One presents the potential over the pitfalls and the other emphasizes the pitfalls over the potential. But, the contrasting visions regarding education from Mandela and Friere also demonstrate the struggles that exist in the study and analysis of education from international and comparative perspectives. Consider first the promise of education described by Mandela (1995, p.194):

> Education is the great engine of personal development. It is through education that the daughter of a peasant can become a doctor, that the son of a mineworker can become the head of the mine, that a child of farmworkers can become the president of a great nation. It is what we make out of what we have, not what we are given, that separates one person from another.

Now consider the pitfalls of education described as cultural invasion by Friere (1986, p.150):

> All domination involves invasion—at times physical and overt, at times camouflaged, with the invader assuming the role of a helping friend. In the last analysis, invasion is a form of economic and cultural domination. Invasion may be practiced by a metropolitan society upon a dependent society, or it may be implicit in the domination of one class over another within the same society.

In some ways, Mandela's statement suggests a recognition of the globalized nature of education and how to appeal to the benefits of education that result from its globally-valued status and ubiquitous presence. Friere's statement, in contrast, highlights the ways that contexts determine the role education plays, and his conviction that it will always serve the dominant groups and individuals in every society, economy, and nation. In other words, Mandela and Friere provide two ways to understand the contribution of globalization and contextualization to international perspectives on education.

Globalization and contextualization are the predominant conceptual frameworks for most international perspectives on education because they represent both the conflict and the compromise that is inherent in education worldwide. Globalization, which is sometimes defined as the internationalization of ideas and institutions, is a universal concern at all levels and in all functions of society (Astiz, Wiseman & Baker, 2002). Globalization refers to a variety of political, economic, cultural, and social changes that transform our world (Spring, 2008). Countries are increasingly interconnected by flows of information, trade, money, immigrants, technology, and culture. Transnational corporations and political organizations interested in education (e.g., the United Nations, World Bank, OECD, and IEA) have grown in size and influence, as have the organized social movements that either lobby for or oppose them.

International perspectives on education often point toward globalization as either an impetus or as an outcome of educational phenomena (Jones & Coleman, 2004; Kamens & McNeely, 2010). The balance between globalization and contextualization has been debated in the field of comparative and international

education since its beginning (Manzon, 2011). Comparativists constantly ask whether we are and should be more interested in global trends or in the unique situations and experiences that are influenced by global trends and factors (Arnove & Torres, 1999). And, as a result this question has become fundamental to all or most international perspectives on education.

However, the dual process of contextualization is equally important to international perspectives on education (Theisen, 1997). "Education" as an institution extends beyond and perhaps even engulfs the formal schooling environment. It occurs in private settings, such as homes and families, and other public settings such as playgrounds and workplaces. "Education" is also bigger than the phenomena of teaching and learning. It includes organizational, psychological, sociological, historical, and other phenomena as well (Cummings, 1999). From this perspective globalization has a moderated effect on schools and communities because there are layers of contextual or environmental influence. In other words, it has become impossible (or at least inadvisable) to analyze phenomena at any level of school or society without considering how these phenomena are contextualized (Crossley & Watson, 2003).

Context is not something that is limited to only one theoretical perspective or research method. Both macro and micro theories, research, and cases help researchers and policymakers understand the importance and impact of context on education (Ragin, 1989, 2008). Comparativists are particularly interested in educational change and the ways that formal education either impacts or is impacted by differentiation by race, class, gender, and other characteristics of individuals and communities (Manzon, 2011). In particular, they investigate the ways that expectations and assumptions both about education and about community are shared or commonly experienced in remarkably similar as well as remarkably different contexts.

International perspectives on education largely take the role of comparisons, which provide a way to evaluate educational process and product (Baker & Wiseman, 2005). These comparisons are of the educational systems, contextualizing and penetrating characteristics of society, and specific situations in schools and classrooms. International comparisons of education allow for the unique and sometimes useful activities of benchmarking and modeling, but they also provide a forum for unnecessary criticism as well as inadequate comparability (Epstein, 2008). Still, comparison is the language of international perspectives on education, and although there are ongoing debates about the "why", "what", and "how" of international perspectives on education, the importance of comparison remains valuable to these perspectives whatever the point of view.

This introduction to international perspectives on education begins with a grounding in the importance of comparison for both international as well as specifically-situated analyses of and expositions about education worldwide. This is followed by several sections that discuss the contrasting perspectives of globalization and contextualization of education worldwide, the discipline-base of international comparative education research and study, the emergence of education as a global cultural phenomenon, and the future trends and topics that international perspectives on education point towards.

The Importance of International Comparison

It is natural to compare (Epstein, 1994). Comparisons are how progress is measured, accomplishments are tracked, and conditions are described. Comparison is the basic building block of information gathering, decision-making, and assessment. Comparison has always been a ubiquitous component of both formal and non-formal education (Wiseman, 2010). Comparative methods have been famously used by some of the greatest classical thinkers in the world from Socrates to today. International comparisons have a long tradition among scholars, professionals, and laymen throughout history as well, but the formal science of international comparisons of education has a more recent history. Structured and systematized educational comparisons began to be institutionalized as part of university study and educational policymaking at the beginning of the 20th century (Wiseman & Matherly, 2009). About 100 years later, international comparisons of education have become ubiquitous as well. Yet, even with the familiarity and constancy of international and comparative education research, data, and discussions, there is still significant discussion about what international perspectives on education are, what they should be, and where they are going.

Like much of educational research and study, international perspectives on education rely upon the theoretical and methodological base that the social science disciplines provide. As a result, many of the formal or systematically-applied international perspectives on education tend to have a particular theoretical and methodological approach to educational phenomena. Like much of educational science and research, international comparative education is founded upon core social science disciplines' theories and methods (Ross, Post & Farrell, 1995). Economics, sociology, and political science are some of the most frequently applied disciplines to the study of international education phenomena.

The comparative method is something that has been discussed, but not decided upon since the advent of formal and institutionalized international comparisons of education. Ragin's (1989) comparative method for the social sciences template for international comparative education, and is worthwhile to consider as one of the few attempts to bring comparative research under one methodological umbrella, so to speak. Yet, there have been many earlier attempts to systematize international perspectives on education. These earlier attempts addressed the importance of context where travelers' tales were told as accounts of the social and educational experience in "foreign" lands (Noah & Eckstein, 1969). Consequently, the defining characteristics of international perspectives on education are not the disciplinary bases for the theoretical and methodological frameworks that are used to study education worldwide. Instead, these frameworks provide a base for larger discussions of identity, culture, and value as both represented and disseminated by education around the world.

In order to understand what international comparative education is, the value and importance of different international perspectives on education needs to be identified. North American and European perspectives on international comparative education dominate the research and policy discussion, with African, Asian and Latin American approaches either aligning with or complementing the traditionally Western cultural and economically developed countries' agendas (Benveniste, 2002). Out of these predominately Western perspectives, which are modeled and

borrowed worldwide, comes an increasingly overt emphasis on comparison. Specifically, the most valued international perspectives on education are the result of comparison. Educational researchers, policymakers, and even the general public have placed increased importance on international comparisons of education for understanding, making decisions about and assessing the quality of educational systems, schools, teachers and students.

International comparison has become the main tool and avenue for understanding how mass education has expanded worldwide and what it does to change both individuals and societies. Formal mass education is increasingly and fundamentally how individuals, communities, and nations know who they are. International perspectives on education and the comparisons that result are also increasingly responsible for defining which knowledge has value and how knowledge economies develop. Even though knowledge production and dissemination has played an important role in societies and economies throughout history, the spread of mass education systems worldwide developed alongside the ability for knowledge itself to be the commodity rather than the tool. As a result, a framework for understanding international perspectives on education needs to recognize and address the role that education plays in the creation of or resistance to the development of certain knowledge economies. But, international perspectives on education are not limited to knowledge and economic production. The permeable nature of education and its importance not only to individuals but also whole societies has led to its elevation as a key tool for social development.

Education has been called a "social vaccine" (Baker, Collins & Leon, 2008), which can prevent or cure everything from national economic problems to the spread of HIV/AIDS. These extreme expectations often overreach the impact that formal schooling can reasonably have, but the impact of school is surprisingly strong given the odds against it in some contexts. In fact, the social impact of education is in large part determined by context. For example, identifying which educational "crisis" factors are shared with other nations around the world, and which are unique by context and community is just as important as knowing what teachers do and how students learn. Education's relationship to society determines what a "crisis" looks like and how the role of education and educational quality is both assessed and communicated to policymakers and public stakeholders. Therefore, international perspectives on education increasingly and comparatively address the social importance and impact of education worldwide as well as its role in knowledge production and economic development.

As the role and importance of education has spread worldwide, so has a set of customs, traditions, rituals and expectations specific to formal schooling. These educational expectations and associated activities have been frequently copied, coercively assigned and passively evolved to the point where formal mass education – what is typically called "school" – has become an institutionalized characteristic of almost every community and system worldwide. For better or for worse, institutions like mass education have a "taken-for-granted" quality. In other words, they typically have stable rules, roles (e.g., student or teacher) or behaviors (e.g., whole class instructions) that are universally accepted as "normal" even when they deviate from traditional social and cultural norms. The normed expectations that result from educational institutionalization and their impact on both the educational process and

product is subject to many different interpretations, depending on one's particular ideology and perspective. This taken-for-grantedness also makes education as an institution difficult to analyze. But, international perspectives on education must identify the effect of core institutions like schooling *across* systems, cultures and communities as well as *within* those same systems, cultures and communities.

Globally Shared Expectations

Why do educational policymakers and the general public in countries around the world seem to remain constantly disappointed by their educational systems, but eternally hopeful in the promise that education holds? And, how does this knowledge transform international perspectives on education? Three key phenomena of international perspectives on education are relevant. One is "achievement envy." A second is the "accountability expectation." And, the third is "access entitlement" (Wiseman, 2005).

Achievement envy is a result of competition, whether it is economic, political, or otherwise. The dominant Western educational model includes the expectation that individual students, schools and systems compete, and alongside the competition expectation is the belief that progress is the result of change. In other words, international perspectives on education often address (either directly or indirectly) the normative expectation that progress happens when positive change occurs – whatever "the positive" is expected to be. In education, progress or positive change is measured (for better or for worse) by high levels of academic performance, which usually means high grades or high test scores. Students and schools who have high levels of performance are believed to have done it because they worked harder for it, or they somehow deserve it. In some countries' educational systems and cultures these expectations are based on a fundamental belief in meritocracy, and in others competition is a result of collective associations. The 19th century American education reformer, Horace Mann, is an example of the former. Mann called education "the great equalizer" because he argued for the potential of each individual to prove themselves through a common model of education available to all school-aged children.

The second phenomenon, which is characteristic of international perspectives on education, is the accountability expectation, and is an increasingly key part of the educational landscape in countries worldwide. In the United States, visible examples of the accountability expectation are each president's educational agenda since Reagan's *A Nation at Risk* (Commission on Excellence in Education, 1982). Other countries' educational systems have also incorporated formal accountability agendas as national or regional policy. Some examples of this include, Germany's move towards common standards and assessments following the release of the PISA 2000 results and the ensuring "PISA shock" in Germany as well as the technique of pairing high and low performing schools into mutually-responsible consortia, which in part propelled Shanghai students to the top of the PISA 2009 results (OECD, 2011). Increasingly, teachers are the focus of systemic educational reform worldwide. Much of the push to reform teacher preparation and hold teachers accountable for student learning is a result of international educational comparisons. Many educational policymakers, and increasingly the public at large in many

countries, strongly believe that accountability for students, teachers, schools and the whole education system is a key to progress.

The accountability expectation is the result of some key assumptions about education, and schools specifically. Beginning about a hundred years ago, educational reformers started to think about schools as organizations much like businesses are organizations. As a result, many educational systems have developed into systems where academic achievement scores are reconciled against international averages or benchmarks to see if the students and teachers made progress or not. And, as the product of the dominant Western model, mass education worldwide is embedded with an abiding belief in the individual – both in terms of educational rights and freedoms, but also in terms of individual responsibilities and consequences (United Nations, 1948).

The first two phenomena, which are expectations for high achievement and strict accountability, are bedrock ideals that many strong and productive institutions are built on. But, they both are compromised by the third phenomenon characterizing international perspectives on education, which is access entitlement. In educators' zeal to make progress and beat the competition, the model for mass education worldwide also is embedded with many seemingly democratic assumptions. For example, the idea that everybody deserves a chance to be "educated" is at the heart of Horace Mann's idea that education is "the great equalizer". And, most educational systems worldwide reflect these ideals, whether purposefully or not. For example, mass education systems in every country are characterized to varying degrees by universal enrollment, compulsory attendance laws, public funding for education, and a fundamental belief that schools create both national and global citizens.

This third phenomenon about access for all complicates the prior expectations about achievement and accountability. How can educational systems keep individuals accountable for high performance if each individual in the educational system does not have the same preparation or chances as someone else? What if students are physically or mentally challenged? What if they are educated in vastly different situations? What if students speak a different language at home than the formal language of instruction at school? What if they have no desire to attend school, but are forced to do so? In other words, the balance between what is often called "excellence" (achievement and accountability) and "equity" (access entitlement) complicates notions of what an educational system, schools and teachers can, should and will do.

Many nations and multinational organizations invest massive resources into educational testing every year, and what usually results are some rankings with relatively little analysis of the data, given the extent of data available for analysis. This is a key component to understanding international perspectives on education, and forwarding the comparative agenda reflected by these international perspectives. And, much of the comparative data available for analysis from and by international perspectives relates to the context in which education, especially formal schooling, occurs. In short, many educational systems have been set up as examples and models for other systems to follow, but international perspectives on education cannot forget the first rule about international comparative education: education is always deeply embedded in society and community.

In other words, the problems that exist in the world outside of a school's walls come right into the classroom everyday because teachers and students live in the world – they do not exist in an educational vacuum at school. So, if there is school violence, then chances are there are triggers that exist in the wider community. If teachers are teaching out of field or are less than experts in their fields, then maybe they teach in an educational system and broader society that undervalues teacher professionalism. In other words, there are many ways that the community and context outside of the formal education system, and of schools specifically, is both represented by the educational system as well as permeates individual schools. Every educational system around the world is a product of its unique social, political and economic context – and the individual schools that comprise each system respond to that context as much as or more than they shape it. The Finnish system provides a relevant example.

Finnish educators have said repeatedly that two of the keys to their success are equity and expertise. Opportunities and expectations in Finnish schools revolve around the ideas that all individuals are provided the chance to learn in a community that values their ideas and abilities at the same level as others. Educators in Finland are highly professionalized and selectively trained (Sahlberg, 2011). The system for educating teachers is centralized and standardized – and taken seriously by all both inside and outside of the formal education system (Finland Ministry of Education, 2003). It is also important, however, to remember that Finnish society is unique itself in terms of its demographics, resources availability, and educational emphases. This provides an example of how international perspectives on education need to rely not only on the internationally comparable data that is readily available from national education systems and multilateral organizations, but also on the unique contextual elements that define communities where schools are located and populated.

Another example of the importance of context to international perspectives on education is China. The Chinese students who participated for the first time in the Programme for International Student Assessment (PISA) outperformed the rest of the world – including Finland (OECD, 2011). But, PISA only tested a sample from Shanghai, which is a particularly well-prepared educational community. In addition, Chinese educators and students have endured a political and social system that is historically built upon test-taking and test-passing in order to be socially, economically, and politically mobile – just ask the Chinese men and women who took civil service or college entrance examinations to escape the rural farms they inhabited during the Cultural Revolution. Some approaches to international perspectives on education assume that all comparison leads to policy borrowing, but this is an unrealistic assumption (Steiner-Khamsi, 2004). Few educational systems are geared towards serving a society where advancement and privilege are all based on an individual's ability to memorize and recite information that conforms with the government agenda, even when that is the reality.

Another example of how the social and political context outside of school shapes how great or how small an educational system becomes is the Kingdom of Saudi Arabia. Saudi Arabia's educational system is one of the few in the world that is completely single sex (Wiseman, 2008). Saudi boys and girls go to separate schools, have separate teachers (who are only male in boys' schools or female in

girls' schools), and are culturally and often physically separated from non-family members of the opposite sex in their lives outside of school as well. For this reason, many in the international education community have been concerned about the access, opportunity and achievement of girls versus boys in Saudi Arabia. But, the evidence suggests that schools may be where Saudi girls have the most advantage.

Saudi girls enroll in school at equal rates to boys and have teachers and school resources that are roughly equal to boys or better (Wiseman, 2008). This is a remarkable development given that in the 1970s only a fraction of girls enrolled in school compared to boys, and most of the adult population of the country was still illiterate. Now literacy rates in Saudi Arabia have skyrocketed compared to the 1970s. And, even though Saudi Arabian students still perform very poorly compared to their regional and international peers on math and science tests, they lead most countries in girls' performance advantages over boys. In other words, girls in Saudi Arabia outperform boys a significant amount of the time. Girls also persist longer in school than boys, and attend college or university at higher rates than boys.

By all of the standard measures girls and boys are equal, and girls have even managed to take the lead in educational achievement and attainment. But, there is a problem. The schools and society at large are still completely gender-segregated with all of the attendant difficulties for working, transportation, socialization, and both political and economic power (Wiseman, 2007). Some have questioned whether or not all of the advances girls have made relative to boys in the Saudi educational system are significant, if these advances do not translate well outside of schools and into the labor market, the government, or society. This, too, is a dilemma for international perspectives on education because the Saudi culture and context in many ways seems to conflict with the individual, competition-driven and democracy laced charter of mass education systems worldwide.

These examples show us that there is much more behind the international comparison of education than just the numbers. For example, going by achievement rankings alone, it could be construed that many educational systems are failing school-age children and, as a result, failing the nation (Martens & Niemann, 2010). But, achievement rankings alone do not paint an accurate picture of what is happening in schools internationally or in specific educational systems. In short, international perspectives that focus on only one approach to educational comparisons across and within systems are misguided. This does not mean that internationally comparative education data should be ignored or that less complex methods of comparison are unhelpful. It means that international perspectives on education require triangulation of data and resources at a minimum in order to validly and reliable represent the reality in educational systems worldwide.

Part of the problem with educational systems worldwide is that there is too much variability within many systems. Too many differences in curriculum standards, too much variation in teacher training programs, too much variability in school conditions and classroom resources where children learn everyday. There is a lot of really useful internationally comparative education data available, which can help educational policymakers, educators and reformers try to "fix" what is wrong with education in particular systems. There are three areas where the data can help individuals and systems "fix" what can be fixed and "improve" upon what is

perhaps already working. These three areas are: infrastructure, capacity, and sustainability.

Educational variation often mimics what goes on outside of schools in the wider society, but educational policymakers, reformers and educators can still use the information from comparative assessments to inform decision-making. In short, the infrastructure for education needs to be much more established and stable if policymakers and the public are going to hold students and teachers to the highest standards of accountability. Next, is the area of capacity. International perspectives on education can address the capacity of students for learning, teachers for teaching, and how educational capacity can be built and stabilized beyond what currently exists.

Finally, whatever changes are made, whatever solutions are implemented, have to be sustained beyond the introductory phase. This means that local communities of parents, teachers, and students must "own" their education, and must invest in its development and improvement to the point where they take-for-granted the new and improved infrastructure and capacity for teaching and learning.

Problematizing International Perspectives on Education

Although there are many strengths and positive outcomes of mass education, sometimes the best way to learn about something is to look at its weaknesses. At the same time that an increasingly homogenous and institutionalized life course dominated by the school strengthens individuals by increasing their potential and providing them with skills, it also disrupts traditional transmission of culture within families. Both families and whole cultures have come to ideologically reject mass education, while simultaneously aligning the schooling with the expectations of mass education, for a variety of reasons.

Individual schools as organizations must be understood within their institutional environment: the social, cultural and legal expectations that govern what schools can and cannot do (Coburn, 2004; Scott & Meyer, 1994). Individual schools have their own organizational form and culture, but they still closely follow the expectations set by the institution of schooling. The institution defines the legitimate role of teachers and students, and provides the criteria used to judge whether teachers and students (or principals, counselors and others) have acted according to the established norms.

Cultural conflict is also institutionalized through schooling and education as much as it is ameliorated by it. Global models of mass education are culturally "adapted" in some degree in each nation they are found (Anderson-Levitt, 2003). This leads to internal inconsistencies in many systems. On the one hand, in many countries the public wants their schools to be free and open to all; so much so that schooling is compulsory until individuals are teenagers in many systems. On the other hand, countries' leaders and public representatives often express a (perhaps political) desire to have the best education system in the world, or at least feel that schools are both pushing and preparing students to perform at the highest levels possible in academic, labor market, and civic responsibility arenas. Yet, participation (i.e., equity) and performance (i.e., excellence) are instead at odds many times – as has already been discussed.

Another conflict arises in many educational systems' approaches to the professional-staffing of schools. In many countries like Japan, teachers are looked to as education professionals and experts in their field. Local school boards and parents would not consider themselves capable of evaluating teacher credentials, just as local city councils do not decide whether or not a doctor is qualified to practice medicine. However, even though there are special schools and colleges dedicated to specialized knowledge about curriculum and teaching, as well as a host of state requirements for certification, many parents and community members feel that they can judge what a quality teacher is. Hence, some systems have adopted alternative routes that give local districts considerable leeway in whom they hire as educators.

There are many other facets of schooling that encode conflict about educational ideals that have accrued over time. The institution of schooling, from its start, has been affected by the dominant cultural debates of the day. To understand international perspectives on education requires looking back at what ideas and conflicts were institutionalized early on in the system. Early leaders in many countries' politics and education proposed radical changes in the way society was structured and the way individuals were politically incorporated as citizens. Yet, these changes are rarely quick because another hallmark of institutional change is isomorphism (i.e., gradual or incremental change). In fact, it took nearly 200 years (until the 1960s) for mass education to become fully institutionalized around the world. For example, after reaching a critical mass sometime in the 1830s, it took over one hundred years (1950) for U.S. enrollment rates alone to reach the "universal" level (at or above 90%) (Snyder, 1993).

Mass education was originally introduced to control, not empower. For example, the early European systems of mass education were organized and enacted by Kings, Emperors or other autocratic rulers who wanted a more loyal, productive and well-trained citizenry. It was not until much later that the notion of citizens' rights (what is now called human rights) came to be so strongly emphasized. For example, Boli-Bennett and Meyer (1978) found that after 1870, national constitutions tended to contain explicit reference to the "child." Later national constitutions also tended to spell out the state's role in providing education to children. For example, does every child have the right to an education? Does every child have the responsibility to attend school? Or, put another way, does the state have the right to make children go to school? Nations that adopted their constitutions after putting a system of mass education in place tend to explicitly protect the rights of the child. This sequence of events can have important implications.

A national constitution can create a system of compulsory education by making it the duty of students to attend school, or the duty of the state to provide free education to all students. For example, when Japanese society emerged from self-imposed isolation in 1869, the nation of Japan started out with a constitution that explicitly gave the state the right to compel citizens to be educated and made it the duty of all citizens to go to school in order to become better citizens. Over time, the Japanese Imperial Rescript on Education came to be venerated as religious dogma. Students were required to bow their heads before a picture of the emperor at school each morning while the principal read the rescript (Rohlen & LeTendre, 1996).

After defeating Japan in World War II, the American Occupying Forces oversaw the re-writing of the Japanese Constitution, where education was defined as a right of the individual instead of a requirement of the state (Beauchamp, 1985). But, there are still societies and nations where mass education is still used as an overt tool for political dominance. For example, the North Korean school system continues to function in this way – subjugating the individual to the state (Hoare, 2003).

In the long run, mass education has generally proven to be a tool for democracy. The danger in creating a mass system of education designed specifically to indoctrinate is that in order to accomplish its ends, the system must empower individual students to some degree, which is the very thing an oppressive system does not want to do. By achieving universal literacy, the state creates a population that can read its propaganda, but also a population that can read the smuggled-in books and texts that speak of revolutionary ideas like "freedom." Oppressive state education systems like those of North Korea or Pre-war Japan are precarious (Carnoy & Levin, 1985). For a time, perhaps many decades, they can suppress individual freedoms. But these same systems create tremendous forces that shift over time to become strong forces for system-wide change—slowly but surely.

Mass education is also linked with increased awareness of individual rights and is often the institution that contributes to expanding those human rights. In 1948 the United Nations adopted and proclaimed the Universal Declaration of Human Rights. Article 26 of this declaration outlines a general plan for national education systems around the world. In brief, it says that education should be available to everyone because it is a basic human right. Article 26 also emphasizes the importance of primary education, in particular, noting that it should be free and compulsory. It asserts that higher education (historically a bastion of elite, white, Western, male privilege) should be accessible to all based on merit. Article 26 finally says, "Education shall be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms" (United Nations, 1948). While not specifically binding to nations around the world, this declaration of education as a human right has served as a fundamental model and has shaped the development of national education systems in a profound way since its inception.

In more recent years, the United Nations (1989) adopted a Convention on the Rights of the Child. Article 28 of this convention specifically calls on nations to provide for the education of all children, to increase access to school and to help prevent dropouts. This document is further evidence that at a world level, both the rights of the child and the idea of mass education have become deeply institutionalized. International perspectives on education must recognize that mass education has become firmly established in Western developed nations like the U.S., Canada and those in Europe, and has expanded rapidly even in the poorest, least developed nations. While significant exceptions can still be found, global culture now recognizes the essential necessity of education for the well-being of citizens everywhere. In other words, the worldwide expansion of mass education has led to a global culture of education, where schooling is both a normative expectation and key identity and life course component for individuals and societies worldwide.

However, there are those -- philosophers like Ivan Illich (1983) or Paulo Freire (1986) -- who have gained notoriety in part for their attack of mass education systems. In fact, there are many different groups and individuals who are highly critical of mass education, in general. While much good is done under the aegis of mass education, Illich and Friere point out that there are negative consequences of the institutionalization of education—largely because of its taken-for-grantedness. As a result, they argue that mass education is unjustified state control of individuals. They say that when it is compulsory, mass education is optimistically defined as the right of the state to create better citizens, but is instead likely to be used by rulers to indoctrinate children and control society.

Around the world, mass education has spread powerful values about the inherent worth of children, learning, and education. Over time, formal education has gone from being the preserve of the rich and pampered to the birthright of every citizen. Perhaps because many people at the beginning of the 21st century still remember racially segregated schools, many see progress towards equality of education as slow and halting. Yet, within the last one hundred years there has been a global change in which almost every formal barrier to education based on race, religion or ethnicity has been removed or attacked.

For example, a racist system of "Bantu" education designed specifically to suppress black South Africans prevailed until nearly the end of the 20th century, but has now been replaced with the right of all children to attend any school they wish, even though this is not often practically feasible, yet. Many gender disparities in education are rapidly disappearing, too, and in some nations girls outperform boys in educational achievement, even when boys are culturally and historically advantaged (Wiseman, 2007). Yet, we do not live in a contented world. One major reason for this is that educational progress is clearly linked with economic prosperity. In the poorest nations in the world, the attainment of universal education is still just a goal, and those denied or unable to participate are usually poor, racial and ethnic minority, girls and women (Lewis & Lockheed, 2007).

Debating World Education Culture

How ideas about education and schooling itself spread worldwide (even in the most remote and culturally unique communities) is often the subject of heated debate among policymakers and researchers in the field of comparative and international education. There are accusations of cultural imperialism as well as assumptions that local cultures and communities are being systematically corrupted by dominant social, political and economic agendas. However, the growing availability and importance of information and communication technology worldwide have brought shared ideas, knowledge and expectations about education to areas of the world that were once distant (either geographically, politically or culturally) from the rest of the world. International perspectives on education come from different vantage points such as the disciplinary bases or cultural contexts discussed above, but they will often be characterized by a shared set of assumptions about what formal mass education is, and ideally should be.

Common models of education exist around the world in spite of the remarkable differences in culture and community. Many explanations are possible, but this phenomenon has become one of the core topics in international comparative

education research and study. Some have made a persuasive case that individuals "imagine" themselves as part of a community, even though they may not have personally met or directly communicated with any of the other members of that community (Anderson, 1996). Education and schooling potentially play a significant role in the development of imagined communities. Yet, there is still much to debate regarding world education culture. While many contexts and environments seem especially receptive to imagined communities, others may resist shared expectations about schooling and education. Yet, even in resistance, there is still a tacit acknowledgment that the shared expectations about education exist.

To this end, much discussion exists about why national educational systems adopt or "borrow" policies and methods from other – often remarkably different – educational systems. Policy borrowing even takes place when institutionalized educational models are otherwise resisted. Models and uses of schools worldwide are in all instances shaped by political agendas, economic conditions and the ability of local communities to both adopt and resist external forces and internal pressures. Dominant political and economic organizations and influences impact less dominant communities or educational groups. The emphasis is on the ways that power (political and economic, in particular) contextualizes educational change. However, there is other evidence suggesting that shifts in educational systems are more complex than mere power differentials. While normative shifts are difficult to investigate, they provide an interesting foil for the arguments that power and dominance are the only or main influences affecting the way that education develops and changes worldwide.

Of the three institutions (schools, family and the nation), only the family is an ancient one. Schools and nations have histories that are only a few hundred years old. For example, Italy and China as countries and cultures have histories that span thousands of years, but they have only been nations since 1861 and 1949 respectively. With the sole exception of the family (Kingston, Hubbard, Lapp, Schroeder & Wilson, 2003), schools are the major socializing institution in societies around the world. This means, that more than the church, clan, or other group, schools govern the lives of children and adolescents, and mold their behavior and outlook.

Although many empires (like Tang China or Tokugawa Japan) had systems of education long before the modern nation came into existence, these educational systems were restricted to social elites or served only portions of the population (Shibata, 2004). The roots of national mass education systems go back to Europe in the late 1700s, and lie in the desire to socialize people as citizens of a particular nation. The Danish king tried to set up a system of schools as early as 1721, but the Prussian emperor was even more successful in establishing mass education when he issued a universal compulsory education law in 1774.

As the Prussian empire conquered and spread across Europe, the Prussians found that one of the best ways to incorporate people into the Prussian state was through education. Many countries became part of this larger, international trend in which nations – primarily in Northern Europe and North America – began to develop universal, compulsory education or mass education (Ramirez & Boli, 1987). In fact, Horace Mann established the common school movement in the U.S. partly

as a result of his visit to Prussia and the ideas about schooling that he brought back to the U.S. with him.

During his visit to Prussia, Mann saw an educational system that was state-financed (i.e., "free"), state-centered universal compulsory education, which had at its aim instilling loyalty and obedience through a military model of school (think about the model of desks in rows, facing forward, and the leader standing in front giving orders). But Mann had more progressive ideas for the implementation of this model of schooling. He saw education as the "great equalizer" that would level the economic playing field, instill moral order, and provide a new future for his state and nation. Of course, to do this every school age individual has to attend school. Thus was born the concept of universal, compulsory education.

Not only did mass education make nations possible, it also made our modern economy a global reality. Parents can no longer transfer their craft or guild or status to children as they could in the past. Without success in school, only the rare individual can achieve wealth and status in most countries' economic and social systems. Except for the ultra-wealthy, few parents can secure lifetime employment for their children. Even wealthy families often spend enormous amounts of money buying extra tutoring and private education (Baker, Akiba, LeTendre & Wiseman, 2001; Stevenson & Baker, 1992). Among professional and middle class parents, pumping time and effort into their child's education is synonymous with good parenting (Baker & Stevenson, 1986; Oswald, Baker & Stevenson, 1988).

As a result, over the course of time, schooling has expanded to take up more and more of the early life course – a term used to describe the standard phases of life (Pallas, 1993). For example, kindergarten is now the legitimate start of schooling, and pre-school has rapidly expanded for a variety of reasons to enroll a majority of children, especially in developed, Western countries (Dickens, Sawhill & Tebbs, 2006). If indeed schooling is such an integral part of each individual's life course, then to a great extent individuals' futures, and senses of self, are determined by the educational system.

Within the modern global system, countries have the right to organize schools to socialize children (Evertson & Weinstein, 2006; Meyer, 1970), and the responsibility for the socialization of children has been increasingly shifted to schools more than families in countries and societies around the world (Pallas, 1993). Schools exert tremendous power, so much so that even in infancy, many families actively prepare their children for "going to school" and look toward school as the place for socialization rather than the family itself (Parlakian, 2003).

This shift in power, from the family to the school, has had enormous repercussions for the way society is organized and functions (Coleman, 1987). Overall, it has allowed the development of more egalitarian and meritocratic societies (though obviously ones which still have inequality) where individuals are often formally judged and become socially and economically mobile as a result of demonstrated academic achievement more than by family connections, gender, race, and socioeconomic status (Rubinson, 1986; Shu, 2004). It has created universal expectations for social norms and beliefs, which provides children with a window into a much larger set of ideas than most families can provide (Boli & Ramirez, 1986).

At the same time, this shift has meant that it is harder for families to remain together as a unit. Driven by employment that is largely dependent on educational success, Americans in particular are mobile. Strong family bonds have weakened, and family or kin rituals are replaced with grade promotions and graduations (Kamens, 1977). And, more seriously, children and adolescents are frequently "infantilized." This means they are considered too immature to take on the social roles that their counterparts in traditional cultures may. These roles range from independently caring for siblings and themselves to working outside of the home (Arnett, 2000; Erikson, 1968).

In spite of the complaints, the institutionalization of mass education has benefitted individuals worldwide. The stark portrait of children raised in countries where mass education has not been institutionalized stands as powerful correctives to the idealistic philosophers of "deschooling" (Lewis & Lockheed, 2007). However, the real negative effects of schooling in totalitarian dictatorships or under racist regimes cannot be denied. Mass education is an exceptionally powerful institution, and such power provides the opportunity for a variety of social uses, both negative and positive.

Some critics are eager to point out that our highly regulated, extended period of age-based education has many negative consequences. In earlier times, teachers often organized classrooms or learning groups based on the student's ability, friends and kin. For example, a little girl who could read very well might be placed in a group of older students where she had an older sister or cousin. In this way, the child could maximize her potential, while having a "safe" person to moderate the age disparity. This kind of grouping and arrangements came in myriad forms, and are still practiced in alternative schools. But, in the highly institutionalized (i.e., legally and culturally determined) school, there is no room for such arrangements.

It is also common to criticize schooling for transmitting a culturally-dominant, Western, "middle class" sense of self. This sense of self is important in providing the continuity necessary in a rapidly changing and ever more fast-paced global society (Pallas, 1993). The sense of self is a crucial element of modern (or post-modern) societies. But, what about students who have a different sense of self? This might be a child who is a "late bloomer" – developmentally on the left side of the bell curve – a black South African student in a predominantly white South African school, or a French Muslim child in a class of largely secular, non-religious peers. Mass education provides a base for students' identity and a foundation for their future social, political and economic participation, regardless of how they and their families see the issues (Ramirez & Meyer, 1980). Here, the school can come into immediate and direct conflict with family (and even community) efforts to preserve a way of life.

While it is true that in some ways, schools transmit social norms based on racial and ethnic majority, middle class values, they also transmit tremendous skill and opportunities for individuals to shape their own life course. The standardization and mass provision of schooling transformed society and led to vibrant democracies peopled with literate citizens. Old social orders – nobles and peasants – have largely faded away. The rise and expansion of universal education has not made a global utopia, but it has profoundly transformed global culture by making the individual (not the race, clan, religion, country or sect) the unit by which we measure

humanity. The very concepts of "human rights," "human capital development," "citizenry," and so forth arise from an understanding that each human being has an untapped potential – a potential that can only be accessed by education. These beliefs have swept around the world at a speed that is remarkable in the history of human cultural change.

Future of International Perspectives on Education

International perspectives on education have been characterized both by tremendous growth and variety since those first travelers' tales. This ebb and flow of growth and rejuvenation is a natural cycle, but one that often causes uncertainty or questioning among educators, scholars and professionals in the field. Debates ensue in any field about its future and what is best for it, but the future of international perspectives on education is especially contentious because it is fraught with disagreement about who has the power or authority to make system-wide educational change and how they will go about doing it globally, nationally, locally and even in individual classrooms and communities.

The future of international perspectives on education is determined, in part, by where international comparative education research comes from and what it represents. Emphases in international perspectives on education are traditionally on the phenomenon of policy borrowing and contextual differences. This suggests that the mechanisms for comparison and the professionalization of international comparative education study and influence are ripe for analysis. International comparative education research and study will continue to play a significant role in the development and reform of educational systems and schools worldwide.

Given the spread of mass education and the enormous technological advances it has made possible, the possibility exists to offer highly individualized education via the Internet and other forms of technology to most students. Yet, in public schools children typically all sit down in front of a teacher in a way that would not be out of place in schools of the late 1800s. In other words, individualized instruction is not often implemented in mass education systems, even when the means for implementing it are available. Take the average second grade as an example. Chances are at that at least one student in the class can read at a fifth grade level, and at least one student is still reading at a kindergarten level. If the range of topics is expanded, even more variation will occur. Why is there such wide variety in the same classroom? Despite considerable advancements in the field of developmental psychology, K-12 school systems are still organized on the basis of biological age – a strategy designed nearly 100 years ago – not by ability or learning style. Why has change been so difficult to bring about in this case?

The answer lies in the institution of mass education itself. It seems that the institution that changed the world (schooling) is very hard itself to change. Institutions, once established, are change-resistance (Jepperson, 1991; Meyer & Jepperson, 2000). The process of de-institutionalization takes decades and requires large scale social mobilization and change in fundamental belief patterns among huge segments of society. Education, as an institution, now permeates so much of life that expectant parents in much of North America, Europe and East Asia plan developmentally appropriate activities for their infants from the moment of birth (Parlakian, 2003). These patterns illustrate that the family itself has incorporated the

basic routines of schooling: explicit curriculum, strict attention to age-based developmental norms, active instruction and the core idea that every human child can learn. From the moment of birth, most people inhabit a social world where the institutional norms of mass education prevail.

The future of mass education is not clear, but despite deschooling movements or the rapid advance of technology, there is no sign that the physical place called "school" will disappear. Rather, in nations without educational systems, systems will eventually be organized. In the developed world, schooling will continue to be organized up and down the life course.

For instance, preschool attendance has skyrocketed and more than 50% of high school students attend some form of tertiary education (Rosenthal, Rathbun & West, 2005). While school itself may become more varied (gifted programs, distance learning, homeschooling) the most basic patterns are unlikely to change. There may be more diversity and innovation, but not the kind of heterogeneity common in the late 1700s. Schools, for the foreseeable future, are here to stay. And, while they are often resistant to change, people can and have changed them. At the heart of every society is a school system, and global society is no exception.

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Part 1

Comparative Education & History of Education

CHARL WOLHUTER

ALSO A DOOR TO THE INSIDE OF A NEW HOUSE — YET ANOTHER USE FOR COMPARATIVE EDUCATION

Abstract

The author has been involved in cross-national research regarding the motivations of students for studying Comparative Education. A wide variety of motivations were identified, depending on national context. This paper begins by summarizing those findings. On a recent bout as guest professor teaching Comparative Education at a Canadian university, yet another interesting employment of Comparative Education was discovered, namely that of introducing international students (from an extra-Western context) to Western education and its philosophical superstructure and the exigencies of studying at a Western university; thus preparing these students for studying at a North American university. This paper reports on that experience.

Research on the use of Comparative Education

Comparative Education has been typified as an "eclectic/diverse field with adjustable borders and contours which are difficult to demarcate" (Epstein & Caroll, 2005: 62), and as a constantly broadening field (Wolhuter, 2008: 340) — crossing new borders, entering new frontiers and opening new vistas. One of the question with which theoreticians of the field occupies themselves is with the significance or utility of the field (*cf.* King, 1965; Larsen, ed., 2010; Manzon, 2011: 174-177; Wolhuter, 2011: 36-48). To be meaningful as taught to students, this question needs to be constantly addressed, especially from the view or experience of students. Therefore, under the aegis of the thematic session of the teaching of Comparative Education (later superseded by the thematic session of Comparative Education as university discipline, as this thematic session is currently known) in the International Conference of Comparative Education and Teacher Training, the comparative study of the meaning and relevance of Comparative Education for students in various national settings developed as a central research project.

A comparative project involving nine countries on five continents, culminating in an article published in the journal *Educational Research* (Wolhuter *et al.*, 2011) identified a host of diverse reasons as to why students in various national contexts would want to study Comparative Education, depicting a picture of a dynamic, pliable, ever-rejuvenating field.

In the case of the United States of America, the dominant motive for enrolling in Comparative Education courses are related to international understanding within the context of education as part of international aid. The hierarchy of expectations of the American students might be understood against the background of these students' experience and career plans in international aid. American student expectations may also result from the amount of foreign aid (and education as part thereof) that the United States of America has been engaged in the past half century, ever since the advent of independence of large parts of the Third World, The Cold War, and the Truman Doctrine. In the case of Ireland the most important motivation was to help students to find a job to teach abroad. The Irish student teachers were mainly in there early twenties and intended to teach abroad at some stage of their career. They also indicated that they hoped it would develop their capacities to teach in the newly developing multi-cultural classrooms in Ireland and to also develop their general teaching strategies. The Greek and South African students looked to Comparative Education to illuminate and to guide the domestic education reform project. Both Greece and South Africa has recently become the scene of fundamental societal reconstruction, of which education is not only an integral part, but in which education had been assigned a pivotal instrumental role to bring about. Bulgarian students' expectations, on the other hand, seem to resolve around gaining of fuller knowledge and insight of their own education system. While undergoing societal and educational transformation as South Africa, Bulgaria as a fully fledged member of the erstwhile Eastern Block, never suffered from academic isolation as South Africa did during the years of the international academic boycott. But the existence of an intransparent government and political-bureaucratic machinery up to 1990 might have created a yearning to know and to understand their education system better. In contrast to South Africa, Tanzania has long since passed through the post-independence educational and societal reconstruction of the 1960s – a project that bore limited success, and whatever educational reform is currently taking place, takes place within the prescribed fixed parameters of the World Bank Structural Adjustment Programme (which Tanzania had little option but to sign) and the neo-liberal global economic revolution. Tanzanian students therefore have a somewhat more detached (from everyday practice), purely intellectual expectation from Comparative Education courses. Oman has recently commenced to develop a mass education system, therefore Omani students, as their South African and Greek counterparts are interested in the value of Comparative Education to illuminate and to guide domestic educational reform. A unique expectation which transpired among the responses of the Omani students, is that, in a country with one public university, and 5097 students studying abroad (total tertiary enrolment 68154), Comparative Education will be seen a means to obtain knowledge of foreign education systems, which will facilitate students to proceed to further (post-graduate) studies abroad. Similarly, among the Thai post-graduate cohort, an interesting expectation was what would assist them in finding an appropriate research design for their theses. Cuban students viewed Comparative Education as a way to gain a fuller understanding of various countries' societies and cultures. Cuban students' expectations could have been shaped by their country's history of using education to create a new society and culture since 1961 (*cf*. Arnove, 1982). They view Comparative Education as revealing how their own as well as other societies and cultures were shaped by

education, and how education contributes to the accomplishment of societal goals, such as societal justice.

The author, who coordinated the above research project, thought that the range of motivations and uses of Comparative Education which emanated from the research exhausted all the possibilities of the uses of the field. Being visiting professor at Brock University, Canada, for the winter semester (January-April) 2012, however, brought yet another relevance of Comparative Education to the fore. The author lectured the course: EDUC 5P21: Comparative Education and International Education. This course is limited to international students. Students mainly from Mainland China, but also some from elsewhere in Eastern Asia, South Asia, the Middle East and Africa study this course as a compulsory part of their Masters in Education in Educational Leadership Programme. The entire course EDUC IP521 is built around Western and Chinese ways of thought, of knowledge acquisition and the Western and Chinese views on knowledge. In this regard the course is reminiscent of a precedent in Comparative Education, namely Joseph Lauwerys' plea for a philosophical approach to Comparative Education, set out in his article of 1959 (Lauwerys, 1959). The two textbooks of the EDUC 5P21 course are:

1. R.E.Nisbett. 2003. *The Geography of Thought: How Asians and Westerners think differently…and why.* New York: The Free Press.
2. S.B. Merriam. 2007. *Non-Western Perspectives on Learning and Knowing*. Malabar, Fl.: Krieger Publishing Company.

Other courses in the students' programme are: Foundations of Education, Organisation Theory, Research Methodology, School Observation (practicum) and Change Theory. It is obvious that this course in Comparative and International Education serves as an induction for students into Western education, learning styles and epistemology valued in the West, and the exigencies and the philosophical underpinning of Western education. It is clear that the cultural and educational background of these students (Confucian and Maoist, albeit a somewhat modernized/modified form thereof) ill-prepare these students for study at a North American university, and Comparative Education serves as the bridging course. Nisbett (2003) makes a well substantiated case that Western and East Asian cultures differ in their metaphysics, or fundamental beliefs in the nature of the world. Whereas Westerns tend to see change in a linear way, Asians, influenced by the Tao, tend to have an eternal cyclic view of change. Aristotle and Confucius presented two different systems of thought, which laid the basis for respectively the Western and the East Asian conceptualization of the world. For example, whereas Westerners views of the world and their thought processes are heavily influenced by the search for individual identity (essentialism) of objects in the world and approach the world in an analytical mode of thought, East Asians tend to view the world more holistically, placing emphasis on relationships rather than individual identity. Second, their characteristic thought patterns differ, influenced by their respective metaphysical beliefs. Then people use the cognitive tolls to make sense, to attach meaning in the world in which they live in. All these are interrelated with people's attitudes and beliefs, values and preferences. Some of the many other differences between Western and Eastern ways of perceiving the world, as highlighted by Nisbett (2003) include:

- Patterns of attention and perception, with Westerners attending more to objects and Easterners attending more likely to detect relationships among events than Westerners.

- Beliefs about the controllability of the environment, with Westerners believing in controllability more than Easterners.

- Preferred patterns of explanation for events, with Westerners focusing on objects and Easterners more likely to emphasise relationships.

- Habits of organizing the world, with Westerners preferring categories and Easterners being more likely to emphasise relationships.

- Application of dialectical approaches, with Easterners being more inclined to seek the Middle Way when confronted with apparent contradictions and Westerners – under the influence of Aristotlean logic – being more inclined to insist on the correctness of one belief vs. another.

- Debate is almost unknown in Eastern Asia. Negotiation and conflict resolution have different characters in the harmony striving East than in Western Europe.

- For East Asians the world is an interdependent world in which the self is part of a larger whole; Westerners live in a world in which the self is a unitary free agent.

All these have implications with the way people learn (Merriam, 2007: 183) and how they approach an education situation. The Confucian and Mao (or then modernized Mao) cultural background taught East Asians the message that education is teacher centred (*cf*. Merriam, 2007: 185), in vivid contrast to the contemporary Western idea of education as student centred. The Confucian and Maoist idea of education being knowledge handed down by the teacher to be absorbed by the student, the latter not suppose to critically question such sanctified handed down knowledge, is the opposite of the value placed by contemporary Western education upon independent and critical thinking. Merely regurgitating what appears in the literature is condemned in the West as plagiarism. Memorisation plays a much larger and more valued role in Eastern Asian education than in the West (although a number of scholars, such as Biggs, 1996, has cautioned against the distortedly naïve representation of this phenomenon, ie this aspect of East Asian learning, in Western scholarly literature). Nisbett (2003: 74-75) writes: "It is not uncommon for American professors to be impressed by their hard-working, highly selected Asian students and then be disappointed by their first major paper – because of their lack of mastery of the rhetoric common in the professor's field."

The course EDUC5P21 at Brock University culminates in

1. the following mid-term assignment:

Students will work in groups of two and have an informal interview /conversation with one male, and one female student at Brock University who has been educated in Canada. The purpose of this assignment is for students to synthesis the theoretical concepts they are learning in class through an experiential learning exercise. This assignment should be 5 pages long.

2. the following final assignment

For this assignment students will write an 8 page paper on the following topic:

Both author of one of your textbooks (Nisbett in the final chapter of his book) and editor of the other textbook (Merriam in her first chapter) express the wish that in future there will be a synthesis of mentalities, of ways of knowing;

enriching for both individual and for society. Imagine you have been appointed principal of a school, steeped in the Western rational tradition, but with an increasingly global student corps. You wish to imbue the school with other perspectives of learning and knowing. How would you go about doing that, i.e. how would you motivate your desire to parents, teachers and school governing bodies; and how would you change the ethos, institutional culture and curricula of the school?

It has been stated that one of the aims of Comparative Education is to serve the purposes of multicultural education, or intercultural education. Recommendably so, although usually what is meant is that Comparative Education will sensitize teachers to the needs, experience and culture of children from cultural descent other than that of the teacher (e.g, Planel, 2008). However the meteroric rise of the international student body, in times of globalization, of the European Union (and ERASMUS and ERASMUS Mundus) places this exercise of Brock University and the relevance of Comparative Education in an entirely new light. The number of international students worldwide has increased from two million in 2000 to 3.3 million in 2009 (UNESCO, 2011), while one projection places the number on 7.2 million by 2025 (Altbach *et al*., 2009: 25). Furthermore with the increasingly mobile world population (in 2000 175 million people in the world, or one out of every 35, were international migrants — up from 7.9 million in 1960), the potential for Comparative Education with respect to international primary and secondary school students is ever-increasing. Here a new vista is opening for Comparative Education and its value in teacher education and graduate Education programmes.

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STRUCTURES OF SCHOOL SYSTEMS WORLDWIDE: A COMPARATIVE STUDY

Abstract

In the past 20 years I have been examining the structures of school systems worldwide. This ongoing research has been enriched by the findings obtained from the lecture course on Comparative Education I have been delivering to students in the Bachelor and Master's Education Programs at Sofia University, Bulgaria.

This paper presents some results of my comparative study on the structures of national school systems. The paper starts with an introduction to the reasons for concentrating on the structures of school systems, and then describes the study details, shows the main structural models and concrete structures and countries where each structure is used, and finally proposes to develop a world comparative structural research approach.

Introduction

The study focuses on the structures of school systems because of the following four reasons:

Firstly, the structure is the central aspect of each national school system. It is the foundation on which the school system is built. The structure defines some of the most important school characteristics, like school entrance age, compulsory education, duration of different school levels, system subordination and internal correlations. Curricula, syllabi, and even textbook contents depend on the structure.

Secondly, the structure is the most conservative aspect. Structural reforms are rarely done, and when they do happen, policy makers usually act after long debates, considerations and experiments have been undertaken. The structure depends much more on national traditions than on other circumstances. After all, the school structures remain much more traditional than other school aspects as education goals, finance mechanisms, curricula, textbooks, standards, teaching innovations, etc. This notwithstanding, it can be said that the past 20 years have seen reforms of school structures in many countries, mostly in East and Central Europe, and Eurasia, but also in some countries in West Europe, Latin America and sub-Saharan Africa.

Thirdly, the structure is visible, easy to understand by students, and, this is a very important moment from both a comparativist's and teaching point of view: the structures are fruitful for comparative analyses and generalizations, and for developing students' comparative thinking as well.

Fourthly, there have been very active discussions on the need for structural reforms in the Bulgarian school system in the past six years or so. In 2006, a strategy program entitled *National Program for Development of School and Preschool Education (2006–2015)* was adopted by Parliament of Bulgaria. In 2011, the Ministry of Education, Youth and Science of Bulgaria launched a project of a new *National Education Act*. Reforming the structure of the school system is one of the main points of both documents. No structural reform has been done so far, but it is obvious that such a reform will start soon. Everything is best understood in

comparative perspective and, in this light, a comparative study on the structures of school systems worldwide would be of benefit to policy makers, student teachers, practitioners, researchers, and to everybody who is interested in schooling in other countries.

Description of the Study

Research Aims

The general aim of the study is to permanently examine the components of the current structures of national school systems worldwide.

The specific aims, through which the general aim is actualized, are to:
- describe the structures of school systems worldwide;
- analyze the national structural characteristics;
- explain the factors that determine the structures;
- compare the structures;
- show the common features, similarities, and differences;
- group the structures into main structural models; and
- predict the future structural development in national, regional and global perspective.

Teaching Utilization

The study results are incorporated into the training process (lecture course, group seminars, exam preparation) of Comparative Education. The study aims at assisting students to:
- widen their knowledge on school structures worldwide;
- develop their comparative structural thinking;
- improve their possibilities to compare comparisons;
- better understand the essence of the school structure; and
- learn how to make qualitative analyses using quantitative data.

Methods

The following research methods are used: data collection, description, national education policy analysis, comparative structural analysis, factor analysis, generalization, future development prognosis.

Data Sources

The CD-ROM editions of *World Data on Education* published by the International Bureau of Education (UNESCO – IBE, 1996, 1998, 1999, 2001, 2003, 2006/2007) and the latest on-line version (UNESCO – IBE, 2010/2011) are the sources of the study.

Geography

The study comprises nearly 100 countries of all continents. They are selected taking into consideration their country profiles: geographical location, country size, population, economy, religion, and specific details of school system.

Clarifications

The 'structural model' is formed by the ratio between primary (or basic) education and secondary education. Each model includes a couple of structures.

Generally viewed, the structure may consist of two or three levels:

- a 3-level structure, consisting of primary education + secondary education lower level + secondary education upper level; an expression of such a structure for instance is 6 + 3 + 3 / 4 that means 6 years primary education + 3 years secondary education lower level + 3 or 4 years secondary education upper level;
- a 2-level structure, consisting of basic education (primary education and secondary education lower level) + secondary education upper level; a sample expression of such a structure can be 8 + 4 / 5 that means 8 years basic education + 4 or 5 years secondary education upper level;
- a 2-level structure, consisting of primary education + combined secondary education (lower and upper level); a sample of this structure is 6 + 6 that means 6 years primary education + 6 years combined secondary education.

Using the International Standard Classification of Education (ISCED revised 2011)[1] the above mentioned structures can be defined with the following formulas:

- a 3-level structure, comprising ISCED levels 1 + 2 + 3;
- a 2-level structure, comprising ISCED levels (1 + 2) + 3;
- a 2-level structure, comprising ISCED levels 1 + (2 + 3).

Most countries have one structure of their school systems. It is certainly well known that at the secondary education upper level the duration of general education and vocational education very often differs by a year or so but this fact does not mean that different parallel structures exist.

In some countries, mostly in Eastern and Central Europe, there are specialized schools of fine arts, music, dancing, and sports that have their own specific structures different from the structures of general and vocational education. Due to the very insufficient percentage these specialized schools have in the national school systems, their structures are not included in the study.

Some countries apply two, three or more parallel structures in their school systems**.** This case is mostly seen in countries that consist of decentralized administrative units (states, provinces, territories, prefectures, cantons, communities). Such countries are USA, Canada, Australia, the United Kingdom, Germany, Switzerland, Belgium, etc. However, there are some countries like Hungary and the Czech Republic that are not federations, but implement a couple of structures in their school systems.

The number of structures used in a country may vary from one to five at the most.

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[1] ISCED levels, revised 2011, are:

0 – Early childhood education; 1 – Primary; 2 – Lower secondary; 3 – Upper secondary;
4 – Post-secondary non-tertiary; 5 – Short-cycle tertiary; 6 – Bachelor or equivalent;
7 – Master or equivalent; 8 – Doctoral or equivalent.
(UNESCO – Institute for Statistics, 2011)

Permanency

It is an ongoing study. Data on school structures are checked and updated every year. Corresponding comparisons and generalizations are continuously done.

Printed Product

A teaching application containing research results by forms of tables, graphs and figures, was published in 2010 (Popov, 2010). An updated edition is planned to appear in 2013.

Results

The study covers a wide range of details of the school structures, such as: availability of compulsory preschool education; school entrance age; definition by low and practical implementation of compulsory education; structural models; transition between the school levels; school level leaving and entrance examinations; recent structural reforms. Here, only the results of the main structural models will be presented.

Structural Models

After examining, comparing and grouping the structures of school systems in 100 countries, it can be said that the following six main structural models are used worldwide.

Model 1
6 years primary education + 5, 6 or 7 years secondary education

It may be called *the British-American model*. The structures belonging to this model and countries, where they are applied, are:

6 + 3 + 3 / 4: Belgium, Ireland, Luxembourg, Poland, Switzerland (in 20 cantons), Cyprus, Georgia, Greece, Canada (in Newfoundland, Prince Edward Island, Nova Scotia, New Brunswick, Alberta, Northwest Territories, Yukon), Cuba, Mexico, Nicaragua, USA, Ecuador, Uruguay, Cambodia, China (this structure is predominant in most areas), Japan, Korea, Iraq, Israel (6 + 3 + 3 is the main structure, in some very rare cases, the structure is 8 + 4), Saudi Arabia, Syria, United Arab Emirates, Nigeria.

6 + 6: Netherlands (the structure is 8 + 6 beginning at the age of 4, if we consider the structure from the age of 6, it is 6 + 6), Hungary, USA, Australia (in New South Wales, Victoria, Tasmania, Australian Capital Territory).

9 + 3 / 4:[2] Denmark, Finland, Portugal, Sweden, Czech Republic, Estonia, Latvia, Slovakia, Slovenia, Bosnia & Herzegovina, Macedonia, Argentina, Paraguay, Venezuela, China, Libya, Yemen.

6 + 2 + 4 / 5: Belgium.

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[2] It seems like that the 9 + 3 / 4 structure is a different one from Model 1. However, it is included in Model 1 because it has originated from the 6 + 3 + 3 structure by connecting the 6-year primary education and the 3-year secondary education – lower level into a 9-year basic education.

6 + 4 + 2 / 3: Germany (in Berlin and Brandenburg), Spain, the Philippines, Singapore, Chad, Congo.

6 + 5: Canada (in Quebec), Peru.

6 + 2 + 5 (or 6 + 7): New Zealand.

6 + 5 + 2: England, Wales, Malta, Jamaica.

Model 2
5 years primary education + 6, 7 or 8 years secondary education

It may be called "*the French model*". The following structures and countries are grouped to this model:

5 + 3 + 3 / 4 / 5: Italy, Turkey, Pakistan, Iran.

5 + 7: Canada (in Saskatchewan).

5 + 4 + 3 / 4: France, Switzerland (in 4 cantons), Colombia, China, Viet Nam, Madagascar.

5 + 8: Czech Republic.

Model 3
4 years primary education + 8 or 9 years secondary education

It may be called "*the German model*". It has the following structures:

4 + 6 + 2 / 3: Germany (in 14 of the 16 provinces), Belarus, Lithuania.

4 + 5 + 2 / 3 / 4: Switzerland (in 2 cantons), Russia, Ukraine.

4 + 4 + 4 / 5: Austria, Lithuania, USA, Kuwait.

4 + 8: Hungary.

Model 4
7 years primary/basic education + 5 or 6 years secondary education

It may be called "*the 7 plus model*". It includes the following structures:

7 + 5: Bulgaria (according to the school reform plan, 7 + 5 will replace the current 8 + 4 structure) [3], Canada (in British Columbia), Australia (in South Australia, Northern Territory, Queensland, Western Australia), Mozambique.

7 + 6: Czech Republic.

7 + 3 + 2: Namibia.

7 + 2 + 3: Zambia.

7 + 4 + 2: Scotland, Zimbabwe.

Model 5
8 years basic education + 2, 3, 4 or 5 years secondary education

It may be called "*the 8 plus model*". The structures and countries belonging to this model are:

8 + 4 / 5: Albania, Bulgaria (8 + 4 is the current structure), Croatia, Hungary, Serbia, Monte Negro, Romania, Canada (in Ontario and Manitoba), USA, Brazil, Chile, India, New Zealand, Angola, Ethiopia, Kenya, Sudan.

8 + 3: Albania, Egypt, Angola.

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[3] The new school structure in Bulgaria will consist of 7 years basic education (divided into a 4-year primary phase and a 3-year so called pro-gymnasium phase) + 5 years secondary education (divided into a 3-year lower phase and a 2-year upper phase).

8 + 2: Armenia, Mongolia.

Model 6
10 years basic education + 2, 3 or 4 years secondary education

It may be called "*the 10 plus model*". The structures are:

10 + 2: Jordan.
10 + 3: Norway.
10 + 4: Iceland.

Here it should be mentioned that during the Socialist era, two former socialist countries – East Germany (German Democratic Republic) and Bulgaria used the 10 plus model in their school systems. The 10 + 2 structure was implemented in East Germany in the 1970s and 1980s, while Bulgaria applied it from 1979 to 1991.

Distribution of the Structural Models

Model 1 is the most popular. It is used in 51% of countries studied. Model 5 is at the second place – 21% of countries apply it. Model 2 is used in 11% of countries while Model 4 can be seen in 9% of countries. Model 3 (6%) and model 6 (2%) are the most seldom used.

Regarding the specific structures, it can be definitely said that 6 + 3 + 3 / 4 is the most popular structure. It is used in 26% of countries. Two other structures are very popular too: 8 + 4 / 5 (18%) and 9 + 3 / 4 (16%). Other structures, each of them implemented in 6% of countries, are: 5 + 4 + 3 / 4; 6 + 4 + 2 / 3; and 7 + 5.

It should be underlined that this statistics is open. As it has already been mentioned the study is ongoing and country data and generalizations are regularly updated.

Other Results

It should be highlighted that the study shows the following main trends in the structural reforms that have been performed worldwide in the past 15 to 20 years:
-    decreasing school entrance age;
-    increasing the total duration of school education;
-    increasing compulsory preschool education;
-    increasing compulsory education;
-    increasing the duration of primary education and at the same time neglecting primary education as a separate school level and putting it as part of basic education;
-    forming cycles that consist of two or more school years; and
-    establishing a large variety of school structures.

The latter trend breaks the myth of any tendency towards harmonization of school structures. All these main trends will be discussed in a further publication.

Conclusion

In the comparative study, some results of which are presented in this paper, the structures of school systems are examined in their functional dynamics, in their relations with other aspects of school systems, in their external rigidity and internal flexibility. The study has the idea of developing and using in practice a

methodological instrumentation that can be titled 'World comparative structural research approach'.

Comparative Education (no matter how it is considered – a field, university discipline, policy decision making tool, or whatever else) is what comparativists do. Such a methodological approach can be used for better mapping of national education systems worldwide, which is one of the main activities in Comparative Education, for the enrichment of research technology, and for helping students to create their own global comparative structural view of education phenomena.

Acknowledgements

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THE ROLE OF COMPARATIVE PEDAGOGY IN THE TRAINING OF PEDAGOGUES IN SERBIA AND SLOVENIA

Abstract

This paper considers three issues arising from the study of the development and the current state of Comparative Pedagogy in Serbia and Slovenia. First, the development of Comparative Pedagogy as a distinctive discipline in Serbia and Slovenia is discussed. Second, the role and the content of Comparative Pedagogy courses in university programmes covering the training of pedagogues in Serbia and Slovenia are presented. Third, special attention is given to the discussion on the role of Comparative Pedagogy in the university education of pedagogues. Comparative Pedagogy has a more enduring development and stronger position in Slovenia than in Serbia. The favourable effects of Comparative Pedagogy on the professional engagement of pedagogues, especially in the process of the modernisation and improvement of education, are discussed as well.

Introduction

The development of comparative education/pedagogy in both Serbia and Slovenia went through two main phases. Initially, there was a need for comparative pedagogy to be recognised and accepted as a new and separate research area by the scientific community. Only then it obtained its place at the university level, giving it the possibility for more intense development.

In Serbia, comparative pedagogy[1] was recognised as a field of inquiry at the beginning of the XX century. However, it had to wait until the beginning of the XXI century to be accepted as an independent academic discipline (Spasenović & Vujisić-Živković, in press). In Slovenia, comparative pedagogy was introduced earlier. It was taught as part of the subject of Comparative Pedagogy and the History of Education in the mid-1980s. In 1992, it became a separate academic discipline (Skubic Ermenc, in press). At least two reasons account for the differences in comparative pedagogy in these two periods. In the 1980s, the academic communities of both countries held different views, whereas in the 1990s, different socio-political conditions existed in these two countries. Until the early 1990s, Slovenia and Serbia were two of the six federal units within the socialist Yugoslavia. In 1991, they became separate countries, giving rise to their discrepancies. Slovenia became a member of the European Union and continued its social and economic development.

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[1] We use the term *comparative pedagogy* insted of *comparative education* because it is suitable to the meaning of the concept. That is, it is in accordance with the notion of pedagogy as a fundamental science that deals with issues of upbringing and education. Consequently, Comparative Pedagogy is one of the educational disciplines.

Serbia, on the contrary, faced a major social, economic and political crisis. It became involved in a war, struggled with the lack of democratic political atmosphere, suffered external sanctions and became overwhelmed by inner political and economic deterioration. Caused by these socio-political differences, scientific development in Slovenia and Serbia in the 1990s completely diverged, including the field of education. As small country, Slovenia has always designed its pedagogical ideas and school system in accordance with the different European ideas and practices. After their separation, both countries felt the increased need for wider communication as well as for a critical response to global trends in education. Serbia faced stagnation, both in educational practice and pedagogy as a scientific discipline. Comparative pedagogy gained more importance in Slovenia, whereas in Serbia, educationalists concentrated on solving internal and existential problems.

At the beginning of the XXI century, Serbia found a way to solve some of its problems. A new government was elected, democratic institutions were established, and major economic, political and social reforms were initiated, creating the necessary conditions for the re-inclusion of Serbian scientists to the international research community. New trends in society, as well as in education, finally led to the acknowledgment of comparative education as a separate course in Serbian universities.

Pedagogy as a discipline and profession: a historical and contemporary view

The development of pedagogy as a scientific discipline in Slovenia and Serbia has apparent similarities. The most obvious one is that the founders of Slovenian and Serbian pedagogy were educated in Germany and Austria. German pedagogy was the most influential in the XIX century, and it had great influence on the development of pedagogy in the Balkan countries in the first half of the XX century. After the First World War, Slovenia and Serbia became part of a unique country, that is, the Kingdom of Serbs, Croats and Slovenes, later renamed as the Kingdom of Yugoslavia. This integration strengthened the cooperation between academic circles. Moreover, the predominance of the term 'pedagogy' during the interwar period (1918–1941) in the Serbian and the Slovenian language was one of the consequences of the influence of German pedagogy, with the theory of education as the core concern (Vujisić-Živković & Spasenović, 2010).

The Second World War caused the division of the Kingdom of Yugoslavia and the great devastation of schools. After the war, Yugoslavia was re-united as a federation, and it witnessed a new economic, political and ideological order, which was largely imported from the Soviet Union. Consequently, the influence of Russian pedagogy became very powerful. The established use of the term 'pedagogy' remained, as it was common in the Russian language. Russian pedagogy was less influential in Slovenia, as one of the most influential after-war pedagogues, Vlado Schmidt, distanced himself from it because of its statist traits. He defended the importance of pedagogy based on the principles of a self-managing society (Schmidt, 1982). Pedagogy is considered a fundamental science, both reflexive and applied, which develops generally valid theories and explains general laws in the area of education (Skubic Ermenc, in press).

Throughout the XX century, professional profile of pedagogues emerged and developed in both countries. The education of Serbian pedagogues started in 1900 at the Faculty of Philosophy of the University of Belgrade. Before that time, pedagogy as an academic subject was taught only for the training of secondary school teachers. The first professor with a Ph.D. in pedagogy, Vojislav Bakić, was appointed in 1892. The first Serbian pedagogues, those educated in the period of 1900–1941, worked either as school supervisors appointed by the Ministry of Education, with the task of monitoring and evaluating teachers and giving expert advice on teaching, or professors of pedagogy in teachers' colleges (Tešić, 1992).

Pedagogy has been an academic subject in the Faculty of Arts of the University of Ljubljana since its establishment in 1919. The Faculty of Arts educated the gymnasium teachers (lower and higher gymnasium). Each teacher had to take a pedagogy course (which then included Philosophy of Education[2] and History of Schooling and Pedagogy). Since 1920, pedagogy has been studied as a major subject at the undergraduate level as well as at the doctorate level. In that year Karel Ozvald, a representative of cultural pedagogy, was appointed the first professor of pedagogy. In 1930, he was joined by Stanko Gogala, who was also a representative of cultural pedagogy. Eight years later, a chair of pedagogy was established, including the subjects Theoretical Pedagogy, Practical Pedagogy, History of Pedagogy, Psychology and Didactics, among others. Majority of the graduates worked as gymnasium professors, and some were employed in different government bodies. After the Second World War, the development of Slovenian pedagogy became strongly influenced by Vlado Schmidt (Vidmar, 2009, p. 19, 20, cf. also Skubic Ermenc, in press).

The possibilities for the professional engagement of pedagogues became greater during the second half of the XX century. Beginning in the late 1950s, pedagogues began to be employed as regular members of the school staff in both Serbia and Slovenia, with obligations different from the previous ones. The main role of school pedagogues is to encourage students' personal and academic development and to contribute to the improvement of the education process in school settings (Trnavac, 1996; Resman, 2000).

Nowadays, prospective pedagogues in Serbia are educated in the Faculty of Philosophy (Department for Pedagogy) of the Universities of Belgrade, Niš and Novi Sad. The studies of pedagogy in Slovenia are offered in the Faculty of Arts of the University of Ljubljana and University of Maribor. In accordance with the Bologna reforms, the faculties/universities of Serbia and Slovenia introduced changes in the organisation of studies as well as in their curricula. In Serbia, the pedagogy study programmes cover four years of basic study (eight semesters) with 240 European Credit Transfer System (ECTS) (bachelor's diploma) and one year of master study. Alternatively, Slovenian Departments of Pedagogy and Andragogy opted for the 3+2 model of study (180+120 ECTS). Unlike Serbian pedagogy, Slovenian pedagogy can be studied as a single-subject study or a double-subject study, combining pedagogy with any other subject in social sciences or arts. Thus,

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[2] When we refer to philosophy or theory of education, two meanings of education related to the German tradition are implied: *Erziehung* and *Bildung*.

those who study it gain double qualification: that of a teacher and that of a pedagogue (school counsellor) (University of Ljubljana, 2012).

Currently, the two countries have several similarities in pedagogy study programmes as a consequence of their common educational tradition, especially during the most part of the XX century. The discipline-based approach in designing study programmes, which has existed in both countries for many decades, remains, especially at the lower study levels. However, it is now combined with thematic or problem-based courses, particularly at the higher study levels. Some of the compulsory subjects (not always under the same title) covered by all study programmes in pedagogy are as follows: General Pedagogy, History of Pedagogy, Methodology of Pedagogy Research, Didactics, Pre-School Pedagogy, School Pedagogy, Educational Psychology, Developmental Psychology, Andragogy and so on.

Pedagogy study programmes in both countries are oriented towards acquiring knowledge and skills in the fields of theory and practice of education. Students should develop competencies necessary for the planning, performance, analysis and evaluation of an educational process; performing consulting activities; dealing with issues related to the organisation and management of educational institutions; organising and carrying out different forms of education and training activities; recognising constructive solutions for improving existing educational practice; conducting research projects and so on.

Today, most of the graduates in both countries work in schools as experts within the school pedagogical–psychological service. Their main duties cover different areas of activities: counselling students on their academic, personal and career development; monitoring the teaching process and students' attainment and progress; supporting teachers in organising and teaching; and cooperation with parents or caregivers as well as with relevant out-of-school services and so on. Pedagogues also work as experts and researchers in national or local governing bodies, institutes and centres responsible for evaluation and improvement in education, research institutes, social service institutions, youth centres, nongovernment organisations dealing with education and so on.

Comparative education as an academic discipline and its relevance to the education of pedagogues

Although Comparative Pedagogy has not been a stand-alone course in the university study programmes in Serbia until the Bologna reforms in 2005, key themes and issues from the field of Comparative Pedagogy have been included in other subjects, such as General Pedagogy, History of Pedagogy and School Pedagogy, among others. Students have been trained to understand the basic characteristics of the school and school system development. They acquire knowledge about the structure and organisation of the school systems in foreign countries (i.e. levels and cycles of education, goals, curricula, administration and management, financing and teacher training) and learn about the basic trends in the development of the European education systems. However, they lack broader knowledge and deeper understanding of the global and specific problems, the trends in the development of modern education systems and the scientific tools needed for conducting comparative educational research.

Thus, during the university reform based on the Bologna principles and because of the changes in the university study programmes, the need for prospective pedagogues to acquire knowledge and skills thoroughly in Comparative Pedagogy was recognised. In the Faculty of Philosophy in Novi Sad, two courses, namely, Comparative Pedagogy I and II, have been introduced as compulsory for all first-level pedagogy students (University of Novi Sad, 2008a; University of Novi Sad, 2008b). The basic study programme in pedagogy in the University of Belgrade covers only an elective course, namely, History of Modern European Education, and Comparative Pedagogy is offered at the master's level as an elective course. At the Ph.D. level, students can choose between the courses of Developmental Trends of Education Systems and Theoretical, Historical and Comparative Research in Education (University of Belgrade, 2009). University of Niš has no Comparative Pedagogy at all. A comparison of syllabi points to some differences in the programme conceptualisation. Thus, the Faculty of Philosophy in Novi Sad emphasises more on the theoretical-methodological issues and problems of Comparative Pedagogy as a scientific discipline, whereas that in Belgrade focuses on topics related to international experiences in education and European tendencies and developmental goals in school systems.

Comparative Pedagogy in Slovenia was already established as one of the fundamental pedagogical disciplines before the end of the XX century. In the University of Ljubljana, Comparative Pedagogy course is mandatory for all students of Pedagogy and Andragogy at the basic study level[3]. Moreover, students have to choose between courses on Education Systems and Comparative Andragogy. At higher study levels, the courses Education Development Strategy (master's level) and Globalisation in Education and Intercultural Pedagogy (Ph.D. level) are offered (University of Ljubljana, 2011). Thus, throughout their studies, students learn about the structure of education systems, with special attention devoted to the issues on education transition, organisation of school counselling and guidance, examinations in secondary schools and enrolment in post-secondary education. Education systems are discussed in terms of the concepts of equity of the system, lifelong learning and school differentiation. Moreover, students are trained to analyse global trends in education, such as the issue of qualifications frameworks, European processes in education and educational tools, modern concepts of literacy, goal-oriented, standardised and process-based curriculum planning, interculturality in pedagogy, autonomy of schools and teachers, quality and evaluation in education and so on. (Skubic-Ermenc, in press). In the University of Maribor, Comparative Pedagogy is taught as an obligatory subject for all first-cycle third-year pedagogy students and is offered as a postgraduate course as well. Both courses follow concepts and approaches similar to those in the University of Ljubljana (University of Maribor, 2009).

Finally, the question remains as to why Comparative Pedagogy is important in the university education of pedagogues. Considering their professional roles and duties, pedagogues should be leaders in the process of the modernisation and

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[3] In the University of Ljubljana, the Pedagogy study program is delivered jointly with the Andragogy program at the basic level study, whereas it is offered separately at the higher study levels.

improvement of education, either at the institutional or at the national level. In both Serbia and Slovenia, pedagogues actually have had an active role in planning and implementing the education reform in the last period.

As policy makers and researchers in the Ministry of Education, national councils, agencies, and institutes, pedagogues should be qualified in understanding the education policies and practices in foreign countries, assessing their advantages and disadvantages based on evidence, and drawing implications for developmental changes in the national context. In the main internationalisation and globalisation trends in education, they need to understand policies of international actors in education and their influence on national policy, as well as critically explore the possibilities and limitations of the educational-borrowing approach.

As members of the pedagogical–psychological services in schools, pedagogues are expected to effectively tackle issues and problems concerning school development, which means to understand the organisation and functioning of educational institutions, as well as the forces and factors influencing them. No less important is the understanding of the determinants and trends of shaping educational reforms at the international, national and institutional levels.

Conclusions

The development of pedagogy as a science in Serbia and Slovenia has many similarities because of their coexistence within the same state during most of the last century. Moreover, there have been no substantial differences in the conception and basic characteristics of pedagogy studies at the university level. The theory of education has been a cornerstone in studying pedagogy, and it is largely retained until today. Naturally, the differences in study programmes exist, and one of them is related to Comparative Pedagogy, which has a more enduring development and stronger position in Slovenia than in Serbia.

A comparison of the status, scope and development level of Comparative Pedagogy as an academic discipline in the pedagogy study programmes of the Universities of Belgrade and Ljubljana points to an apparently better situation in Slovenia. In the University of Belgrade's Faculty of Philosophy, Comparative Pedagogy has just begun its development as a self-contained discipline, and its intense development is still ongoing. Considering that comprehensive social and, consequently, educational reforms in Serbia lag behind those of developed European countries and that Serbia intends to be included in European trends, we significantly recognise that pedagogues, as experts in the area of education, should be enabled to approach the current school reforms in Serbia critically in the context of such reforms in other countries. Under the current trends in the internationalisation of educational policy, observing the tendency to empower Serbian pedagogues to overcome its ethnocentric position in educational theory and practice is also encouraging. In this respect, the experiences of Slovenian professionals may be useful to their Serbian colleagues. Professional contacts and cooperation in the field of Comparative Pedagogy between Slovenian and Serbian pedagogues, which have been intensified in recent years, contribute to the exchange of ideas and fruitful discussion on global and nationally specific pedagogical and educational issues.

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COMPARATIVE AND INTERNATIONAL EDUCATION AND THE TEACHING PROFESSION: THE CASE OF MARC-ANTOINE JULLIEN

Abstract

In this paper an attempt is made to prove how Jullien's ideas and concerns about education - especially about teachers and teachers education - written in his *'Esquisse'* still apply. Interpretations concerning Jullien's writings remain open and encourage a fertile dialogue in Comparative and International Education and Teachers Education today. Many researchers of Comparative and International Education put emphasis on Jullien's questionnaire as they consider it strictly structured; up to a certain point, but not always, and descriptive with a rationalistic and statistical approach. Nevertheless, a great number of qualitative and pedagogical questions are located in it. According to some researchers, these questions are far ahead of their time and deal with issues that are met in previous similar studies (for instance the questions on teachers, teacher education, teaching material and ethos at school, relations between parents and teachers, the importance of physical, as well as health and moral education, renewal of curricula and teaching methods, interest in pedagogical/educational innovations in schools etc). Many of the education problems mentioned in it seem to exist even in our modern world today.

Introduction

In the last 30 years many educationists have written about the problems which the education faces due to the political and economic changes and crises in the world. These issues have an impact on important professional aspects of teaching and have been the focus of both state policy and teachers' professional associations and unions policy for years (Karras 2011; Karras and Wolhuter 2012; Synodi 2001). Many governments in the western world (e.g. United Kingdom, Australia, New Zealand, USA) have attempted to address most the above topics through legislation. These reforms, according to Hatcher (1994), reconstruct the whole teaching profession. This reconstruction takes place in three broad areas, which he defines as following:

- Work process, which includes teachers' education and training (see also Hartley 1991; Barton, Barrett, Whitty, Miles, and Furlong 1994; McCulloch and Fidler 1994), initial and on-going, the intensification (see also Apple 1988; Jeffrey and Woods 1998) and regulation of teachers' work in class and in school (see also Wilcox and Gray 1996) regarding particularly the curriculum and assessment (see also Apple 1988; Wexler 1987), flexibility in teaching, new skills required of teachers (see also Aronowitz and Giroux 1986; Dawkins 1991; Troman 1996) and a new parent-teacher relationship.

- Work terms and conditions and teachers' unions (their authority and jurisdiction), which refer to teachers' induction period, their job description and their performance related pay.

- School organizational culture, which regards mainly teamwork among teachers within a school hierarchy (see also Hargreaves 1994) and a change in their

professional ideology and their perception of their work (see also Aronowitz and Giroux 1986).

The reforms in the above areas have been criticized by educationist because they do not improve education for all people and turn teachers into technicians who follow directives from the above (Aronowitz and Giroux 1996; Dawkins, 1991; Wexler 1987). Even the most recent empirical studies have also shown that the above issues continue to plague education and the teaching profession (Karras 2011; Kubow and Karras 2011; Karras and Wolhuter 2012). For example, based on data from teachers from nine European countries (Greece, England, Sweden, Cyprus, Germany, Finland, Russia, Italy and Jordan) Karras found that teachers are concerned and influenced by factors which can be grouped according to the above areas. In teachers' opinion, there are:

- New conditions in their work regarding for example new technologies, creativity, learning, motivation, teacher-pupils relationship and multiculturalism (respective to the changes in the work process, as defined by Hatcher).
- Stress, time pressure, adaptation, rivalry and material inefficiencies in class and in the school environment, teachers' initial and professional education and a need for the improvement of their pay (respective to the changes both in the work process and in work terms and conditions, as defined by Hatcher).
- The teachers' role in terms of its theoretical conception, which is related to Hatcher's organizational culture of schools (Karras 2011, p. 182).

So these issues are still problematic and educators and politicians are struggling to find the right solution. What will be shown next is that with the questions in the ''*Esquisse et vues préliminaires d' un ouvrage sur l' Éducation Comparée'* [1] written by the French Marc-Antoine Jullien, 'father of Comparative Education' (Kazamias 1991; Kaloyannaki and Kazamias 2009) and published in France in 1817, Jullien covers many aspects of the teachers' professionalization process and many current education problems in general.

Comparative and International Education and teachers and teaching profession

In reality, according to some researchers, Jullien is a humanist who prioritizes the amelioration of the education for all people, of all classes and both genders in order to combat societal corruption and improve people and their societies (Calogiannakis 2002; Kaloyannaki and Kazamias 2009; Karras 2009). He focuses on the need of public schools for good teachers and good books. To Jullien, the amelioration and perfecting of education is the purpose of Comparative and International Education. His famous *'Esquisse'* includes questions which Jullien thinks should be answered when compiling comparative tables which will highlight the defects of the various education systems (Kaloyannaki and Kazamias, 2009). Yet these questions show the significance he attributed to certain issues in order to improve the quality of the education offered at his time.

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[1] *Plan and preliminary views for a work on Comparative Education*

According to Jullien, France, at that time, had the following education problems:

- Public (under the government's control) schools offered an incomplete and defective education.
- There were continuity and transition problems among the public schools of different levels.
- The education offered by public schools was not in harmony with the physical, moral and intellectual nature of the human beings.
- The education offered by public schools was not related and connected to the pupils' real needs or the needs of their nations and their governments (Calogiannakis 2002, p. 82).

In the above perspective, we can observe that the rationale behind the reforms introduced in education in the western world since the 1980s was based on observations similar to those described by Jullien about the French education system in general at his time. Governments decided to become more involved in education because schools provided incomplete education just like Jullien believed about French education. However, it is the educationists who have criticized the reforms that held a similar to Jullien's perspective regarding the education of people. That is these educationists perceived the unconnectedness of the offered education services to people's nature and needs or the ones of their countries before and after the reforms (Angus 1991; Aronowitz and Giroux 1986; Blackmore 1991; Habermas 1976 in Dale 1989).

Beside his perspective on education quality, the questions in the '*Esquisse*' refer to a variety of topics, related to teachers and teachers' education, such as:

- The education and in-service training of teachers. Jullien dreams of an initial education for teachers, which will be offered by an institution where future teachers will learn the best teaching methods (Calogiannakis 2002, p. 77). This view is very interesting since even nowadays there are reforms aiming at providing the best education for future teachers (Karras and Wolhuter 2012; Synodi 2009).
- Their salary and the regularity of their payment, their tenure, their pension (questions 22-26).
- Problems of incompetence or unprofessional behavior (questions 27-28) and the need for a record of the active teachers (questions 13-20).
- Teachers' status (questions 29) and their loggings (question 22).
- Teachers' relationship with parents (questions 108-110), governors and religion (question 30).

Jullien adds to the *'Esquisse'* questions that refer to the teachers' duties in school (besides the relationship with parents and other education partners) and the teaching process. These questions regard:

- The methods employed to teach (questions 94-100).
- The subjects taught and particularly the 3Rs (reading, writing, arithmetic) (questions 91-93, 101-104).
- Children's physical health and education and its promotion (questions 41-65).
- Discipline and classroom management techniques and priorities and especially the way in which these techniques and priorities relate to the children's moral, religious and social development (questions 66-90).

- Teachers' working conditions and environment, such as the state and condition of the schools where they are employed and of their classrooms in particular (questions 1-9) as well as the number of pupils that each teacher is responsible for (questions 31-33).

Discussion

Jullien's questionnaire represents an important issue concerning education in different countries and implements his theory, as it is presented in the first part of his "*Plan*", relating it with its implementation through the formulation of specific questions. Although the method is practical and applied, the results are qualitative, subject to interpretation and centre on human beings and their personal, familial religious, ethical and social values within the framework of their education. Many researchers put emphasis on Jullien's questionnaire as they consider it strictly structured; up to a certain point, but not always, and descriptive with a rationalistic and statistical approach. Nevertheless, a great number of qualitative and pedagogical questions are located in it. According to some researchers, these questions are far ahead of their time and deal with issues that are met in previous similar studies (for instance the questions on teachers, material and ethos at work, relations between parents and teachers, the importance of physical, as well as health and moral education, renewal of curricula and teaching methods, interest in pedagogical innovations in schools etc) (Fraser 1964; Gautherin 1993; Leclercq 1999; Debeauvais 2000; Karras 2007; Kaloyannaki and Kazamias 2009).

The questions are a "guide" for comparative and international studies and, as predicted by Jullien, concern the present day situation of education, teachers and pupils in public schools in different countries, and their comparison. It is also underlined that they "*introduce a practical and modern attitude toward educational research*". It has a great number of questions (120 for primary and 46 for secondary education, respectively) which in their majority are exceptionally specific; they refer to collecting information on the number of schools, students and teachers in proportion to population, teachers' hiring and qualifications, time schedules per day and year, length of holidays, teaching methods, moral education, health and vaccinations, teaching manuals, examinations content and frequency, discipline and punishments, motivations and praise etc. These questions are substantially the "tool" with which he intended us to collect, compare, and evaluate educational quantitative and qualitative information from different countries.

Often, Jullien mentions the terms "*culture*" and "*people's welfare*" and he links them to good education, good teachers and sound education policy. He stresses the importance of education during childhood, underlining the physical, moral and intellectual development of children. He talks about human relationships in the classroom, focusing on the role of the teacher and the relationships in school. He also connects public education to the education of children who come from lower classes and considers that the "*school's objective is to attune the physical, moral and intellectual world*". In Jullien's life and works, one can distinguish certain elements which, in combination with each other, had an effect on Jullien's pioneering ideas in the promotion of the episteme / "*science*" of Comparative and International Education. Also, he was nurtured by the ideas and spirit of the Enlightenment "paradigm of modernity" with its emphasis on reason/ rationalism,

empiricism, science (including social science), universalism, secularism, progress and the nation-state (Kaloyannaki and Kazamias 2010).

It is true that all these issues related to education and teachers analyzed by Marc-Antoine Jullien in 1817 cover - among other things - important aspects of teachers' professionalism, which still remain central aspects in modern dialogue for teachers' education and profession today (e.g. Karras 2011; Karras and Wolhuter 2012; Synodi 2010; Synodi and Tzakosta 2012). This is an important contribution of the '*father of Comparative Education*' to the field of Education and especially to the field of teachers' education today.

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COMPARING MANAGEMENT MODELS OF SECONDARY SCHOOLS IN TAMAULIPAS, MEXICO: AN EXPLORATION WITH A DELPHI METHOD

Abstract

For a preliminary exploration of management models between two secondary schools, a Delphi method was used in order to identify and focus relevant topics for a larger research. A first approximation with this method proved to be a heuristic tool to focus and define some categories and guidelines of enquiry. It was found that in both of the schools explored, teachers and non-teaching staff assign a similar set of priorities to dimensions of management: first priority is assigned to principal`s leadership, different internal relations come in second and external affaires come at last. When teachers' answers are separated from non-teachers', in the school with better academic results, the former assigned a first priority to teachers' updating. From these results, different narratives could be constructed.

Purpose of the research

What this paper reports is part of a larger research project with the purpose to identify the models of school management that are related to successful educational outputs. It is expected that the findings of this research will cast some guidelines for the design of in-service training courses for headmasters and educational managers.

This research has specific objectives, but the first phase of the inquiry was to explore the different dimensions that make an effective school-based management from the perspective of the school actors and the importance that individuals assign to every one of them. The specific purpose of this paper is to report on the preliminary findings in two secondary schools selected for this exploration, with special reference to the difference between the visions of the teachers from the participants in the school organization, and the differences between the two schools.

Method of inquiry

As this is an exploratory inquiry, there is no need for probability sampling. A purposive kind of sample has been chosen, also called an illustrative sample based on the purpose of the study and assuming that it is not representative of a larger population. In this way, we had asked the Sub-minister of Planning of the State Ministry of Education to select for us six basic education schools, with two criteria: first, that three of them had an average assessment above the national media on the National Evaluation of Academic Achievement in School Centers (ENLACE by its name in Spanish) and the other three with an average below the national media on the same exam; second, that the six schools were located on similar socioeconomic neighborhoods of the same city, in order to neutralize this variable.

We were given a list of four elementary schools and two secondary schools, one of them being a general secondary school and the other a technical secondary school. In Mexico, secondary school is the third section of the basic compulsory

education, for children with 12-15 years of age. The first is pre-school education and primary education is the second.

To compare management models constructed by people in these schools, the task is being approached in three phases: the first is an exploration with a Delphi method, the second is a set of in-depth interviews, and third will be an application of a questionnaire. This paper presents a preliminary report, comparing the two secondary schools' results of the first phase.

The Delphi method consists of a survey conducted in two or more rounds. The second round provides individuals with the results of the first, so that they can change their opinions or stick to them. One of the advantages of the method is that it is done anonymously, avoiding any possible pressure from the rest of individuals in the organization.

For this study, a small questionnaire was designed giving them a list of nine factors considered as constituent of the school management. A tenth slot was empty, for them to write down another factor considered to be important. The participants were asked to assign a number according to the priority they give them for the management of an effective school, which is to say, for a school with good academic achievement of students.

It is important to warn that the results analyzed in this paper are the results of the first round of the questionnaire, given that at this stage we were interested in discriminating the answers of the teachers from the answers of the rest of the personnel working at the school.

Thesis statement

Learning of students in schools depends not only on the training and capacities of their teachers, but also on a number of factors associated with the conduction of a school as an organization which facilitates an environment for learning.

Besides the initial writings by Dewey (1946), about the limits of teachers to educate in the absence of an adequate environment, some authors have explained differences of school learning outcomes, just like the different family, social, religious or racial   aspects that produce predispositions for learning (Coleman, 1969; Jenks, 1972).

Nevertheless, some other authors have found evidence that socioeconomic inequalities, although with some weight, is not a determinant factor that makes the difference in learning outcomes among schools, but a set of factors that have been included in the notion of "school management". Notion that has been gaining importance during the last three decades, on studies by authors like Stenhouse (1987), Elliot (1990), and by the World Bank (2008), where some aspects, like principals and teachers sense of ownership of the school, or as parents involvement, are taken into account for the development of an adequate school environment.

In recent years, the approaches to educational quality have stressed attention on factors that impinge on school organization and its articulation with teaching (Bradley, 1993; Brahan, 1995; Gento, 1996). Nowadays, school management is recognized as the set of activities that, with different dimensions, are part of the school processes and may have implications in achievement of students. (Alvariño, 2000).

Researchers on effective schools appreciate the importance of a good management for the success of these institutions. They sustain that aspects such as organizational climate, leadership styles, an optimum use of human and material resources and time, planning of activities, distribution of tasks, the efficiency of administration, are related to the quality of educational attainment (Gento, 1996).

School management is defined as the set of actions realized by school actors in relation to the fundamental task of the school, which is to generate the conditions, environment and processes needed for students to learn according to the ends, the objectives and purposes of education.

In different terms, school management has been the object of diverse conceptualizations that recognize the complexity and the multiplicity of the component elements. From a comprehensive perspective of the processes going on inside the school, "school management is understood, as the scope of the organizational culture of the school, embodied by the managers, the teachers, the norms, school decision-makers; actors and factors related to a particular way of doing things at school, their understanding of objectives and their identity as a collective, the way they construct a learning environment and the links with the community where school is located" (SEP, 2001).

The term "model" is used in this paper as a representation of the set of priorities that school actors place on the different dimensions, or factors, that pertain to school management. A model of management focuses the school as an organization, with functioning and practices related to results. The role of the actors takes a relevant stand in terms of the generation of internal dynamics among colleagues to produce particular management frameworks that lead to particular learning environments and outputs.

One of the main assumptions of this research is that a successful management model is constructed with a culture of collaboration among the actors, with capacities to sustain the transformation of their practices as a condition to improve learning of students. To become a community motivated to learn from experience in the improvement of educational service, the planning of activities, the administration of resources, the involvement with parents and community, so as to exhibit results.

From this perspective, it is important to know the priorities that different actors of the schools assign to the management factors, or dimensions, of those schools that have produced a better learning attainment compared with schools with less educational success.

Key findings and conclusions

Both of the secondary schools that were selected, were founded during the first half of the eighties to provide their services to outskirts neighborhoods of the city of Victoria, capital of the State of Tamaulipas, Mexico; One of them is a "general" secondary school (School A) and its results in the national exam are above the national media; the other is a "technical" school (School B) with results below the national media. The big difference between these kinds of schools is the weight allotted for technical training within the curriculum.

School A has a total enrolment of 682 students: 459 of them go during the morning shift and 223 go to the afternoon shift. Proportions by sex are similar for both shifts. Although the statistics department counts 249 people as the total of

personnel, actual teachers are only 76. The rest of them are commissioners to the union or to different offices of the ministry of education. For this study, the latter elements are considered as non-teacher staff.

School B has a total enrolment of 628 students: 442 go during the morning shift and 186 go to the afternoon shift. The personnel attached to this school are 151, from which the teachers are 75, the rest of them are considered as non-teacher staff. As in School A, many people of the non-teaching staff are commissioners to different offices and are not actually taking part of the daily school life.

There are many people attached to these schools, but the respondents of the Delphi questionnaire were the teaching and non-teaching staffs that actually work at these schools on a daily basis, participating in the construction of the organization and its management, with their social interaction.

In School A, the teacher priorities were in the next order: 1) Updating of teachers, 2) Principal leadership, 3) Planning of activities, 4) Colleague relations, 5) Resources administration, 6) Relations with parents, 7) Communication with supervisor, 8) Communication with authorities, 9) Neighboring relations, 10) Other.

At this same school, the non-teachers staff priorities were set in the next order: 1) Principal leadership, 2) Updating of teachers, 3) Colleague relations, 4) Planning of activities, 5) Communication with supervisor, 6) Communication with authorities, 7) Relations with parents, 8) Resources administration, 9) Neighboring relations, 10) Other.

The prioritization of all together, teachers and non teachers, in School A, were the next: 1) Principal leadership, 2) Updating of teachers, 3) Planning of activities, 4) Colleague relations, 5) Relation with parents, 6) Communication with supervisor, 7) Resources administration, 8) Communication with authorities, 9) Neighboring relations, 10) Other.

In School B, the teacher priorities were set in the next order: 1) Principal leadership, 2) Other (where many of the respondents used the blank slot to write down a number of phrases pertaining to pedagogical relations with students), 3) Updating of teachers, 4) Planning of activities, 5) Relations with parents, 6) Resources administration, 7) Communication with supervisor, 8) Colleague relations, 9) Communication of authorities, 10) Neighboring relations.

In School B, the non-teacher staff priorities were set as follows: 1) Principal leadership, 2) Updating of teachers, 3) Colleague relations, 4) Other (some of them filled the blank space with phrases related to pedagogical relations with students), 5) Relation with parents, 6) Planning of activities, 7) Communication with supervisor, 8) Communication with authorities, 9) Resources administration, 10) Neighboring relations.

Altogether prioritization in School B, was: 1) Principal leadership, 2) Other, 3) Updating of teachers, 4) Colleague relations, 5) Planning of activities, 6) Relations with parents, 7) Communication with supervisor, 8) Communication of authorities, 9) Resources administration, 10) Neighboring relations.

Contribution and future direction

As an exploratory method, the Delphi helps in the first step for the construction of a heuristic approximation to focus and define the first categories and guidelines of enquiry.

One of the main findings, at this preliminary stage, was the fact that we were missing a management dimension that was important for people at schools. The answers given by them in the 10th empty slot of the Delphi questionnaire suggested that, besides the pedagogical dimension of the classroom setting, a pedagogical dimension of the school had to be taken into account. This management dimension is something produced by the school as an organization and has to be considered in the rest of the research.

Second. Within the set of external relations of the school, besides relations with supervisor, with authorities, with parents and with neighbors, the relations with the Teacher`s Union has to be considered, since it has a high level of influence in the posting of personnel, specially in the case of non-teacher staff that might orient the management model of the school. Who are the real and influential actors in the management of the school? Or, what is the weight every sector has in the configuration of a management model?

Answers given to this preliminary Delphi exercise come to the forefront with at least two narratives, not necessarily conflicting to each other: principal as a number one priority is related to the traditional model, in which the headmaster is empowered up to the point where he is the only owner and responsible for the conduction of a school. Within this model, the rest of the members of an organization become alienated and detached from the social dynamics of the school. This explains why external relations of the school had the lowest priorities; those are a principal's duty.

When teacher answers are separated from the answers of non-teacher staff, their updating become the most important priority for teachers of School A. This would be a relevant difference between the two schools that calls for further research.

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PELLA CALOGIANNAKIS & THEODOROS ELEFTHERAKIS

CLASSROOM AND SOCIALIZATION: A CASE STUDY THROUGH AN ACTION-RESEARCH IN CRETE, GREECE

Abstract

The classroom, the teacher and the students, mostly, through their activities and contacts, as well as their daily presence and personality form the classroom atmosphere that is unique and different from any other (Bikos, 2004: 104. cf. also: Bakirtzis, 2002) and it helps or hinders the school progress of each student and school process in general. In this action research we tried to record the typical situation of social interaction between members of a classroom, that is, we investigated its structure and function, in order to see whether its authoritarian, democratic or promiscuous function affects the interaction-meeting, the relationship-interdependence and interaction between students as well as between students and the teacher.

Introduction

Social scientists and scholars were led to a theoretical micro-optical approach of social phenomena, after a long persistence in macro-optical vision of society and its subsystems, one of which is the institution of education. Indeed, many research efforts that have preceded it, and sociological theories that have been recorded (Nikolaou, 2009: 30-50) show that macro-factors (economy, politics) have an important influence on school development and student performance. However, the effect of micro-factors, such as the individuals themselves, action and communication between them, can be equally important (Gogou, 2010: 237, 256; Nikolaou, 2009: 50-54; Lamnias, 2001: 175-176. cf. also: Calogiannakis, 1993: 12-13; Calogiannakis, 2002a; Calogiannakis, 2002b; Calogiannakis, 2003; Eleftherakis, 2009: 76-80).

Research Methodology

In the present study, with the sociometric test (Moreno, 1953; Jennings, 1948; Moreno, 1970) we detected and recorded some social and political skills of the students of this classroom (e.g. popularity, leadership) and after the recording of this overall environment of this classroom (authoritarian, democratic or promiscuous) we tried to see how this affects the socialization and learning process of pupils in this class. Also, we compared the results of the sociometric test, both in relation to the initial estimates of the teacher and, in relation to two different measurements-recordings, that we investigate, that is, the popularity, sympathy and popularity-leadership skill of the students in the classroom. In this way, we can understand why differences arise with the recordings of sociograms either between different skills (sympathy, leadership) or between teacher's predictions-expectations in relation to sociometric recordings of the students. Our aim is to design an appropriate pedagogical and educational intervention, so that the teacher will attempt to resolve

problematic situations in the classroom in order to promote a healthy socialization of the students.

The methodological techniques used were: sociometry, for measuring the attraction or repulsion between the students (Berg, 1998: 160) and mapping the internal dynamics of the classroom (Gurvitch, 1947; Maisoneuve, 1966; Paquette, 1979; Bastin, 1970; Parlebas, 1992; Kogoulis, 1994: 54-55); and interview, a very useful tool, which has enabled us to achieve a dual purpose: a) the 'gathering of information'; b) the 'supply of information' to the teacher to promote his actuation.

Research questions - Results - Discussion

This action-research conducted during the school year of 2010-11, in the second grade of a primary school in Rethymno, Crete, Greece that consisted of 17 students (8 boys and 9 girls) and a teacher who was participating in the research.

Our research was identified and designed by basic research related concerns regarding:

a) Investigation of the teacher's accuracy of subjective opinion-expectation for the students.

b) Does the use of a multi-methodical approach such as action-research, with the sociometric test and the interview help the teacher to identify the specificity of each student ranking him to a category to sociometric status (popular, average, controversial, neglected and rejected) (Coie, Dodge & Coppoteli, 1982) and to the formation of a more integrated view of the class as a group?

c) Does the combination of the quantitative sociometric method with the qualitative interview method, in the particular action-research, have the ability to create opportunities and educational tools for troubleshooting in the classroom? Otherwise, the collection of reliable data makes possible the composing of the pedagogical intervention of the teacher, who thereafter will be helped to differentiate the individual or team pedagogical or learning situations and, finally, to achieve the transformation of a loose or non-developed team to a team "*with constant composition, high tolerance for integration, and sophisticated social level*" (Bikos, 2004: 104).

d) Is there any differentiation between socialization and political socialization – social and political skills – i.e. is there a difference in the popularity of students deriving from either the exuded sympathy, or the leadership skill?

Firstly the interview with the classroom teacher took place, in which he gave, initially, data for each of his students and then he made a prediction for the popular, the neglected and the rejected students, in relation to the popularity they have among their classmates, which derives from their existing sympathy or their leadership skill. During November the sociometric test was given to the students for the first time. The questions were about the selection and the rejection of up to three classmates in relation to the sympathy-antipathy and the leadership they show (cf. Appendix). Specifically, the questions were: 1st question (Leadership Skill). "*Your teacher has to leave the classroom for a while. Which one of your fellow classmates do you think that could take his place or not for a while? Can you think of someone else instead? Who else?*" 2nd question (Sympathy). "*You have agreed with your mother to invite some of your classmates over at home on Saturday. Which one of your fellow students would you prefer to invite and which one not? Who else?*" The

test results in the form of sociometric matrix were discussed in a second interview with the teacher. Then the educational intervention was designed (cf. Eleftherakis, 2009: 80-93), which was implemented by the teacher throughout the school year to eliminate the problems of both the whole class and some of its students (Queiroz, 2000: 109-117) and which included individual and team work with the parents (Kourkoutas, Eleftherakis, 2008). In May, towards the end of the year, first in a third interview-prediction the teacher was asked his opinion about the popular, the neglected and the discarded students and then the sociometric test was applied for the second time to the students of the class. The findings-results of the new test were discussed with the teacher in comparison with both the predictions of the teacher and the results of the first application of the test, into a fourth interview with him.

The results of this action-research are quite a few in number as well as very interesting and can be categorized in relation to the assumptions of the research. In what follows we present two of our main research results.

A. Criteria for student selection or rejection of their peers

According to some researchers (cf. Bikos, 2004: 100-101) the age of children sets the criteria by which they choose or reject their classmates during the sociometric test. In our study the age group of our sample is between the ages of Kindergarten to the second grade of the Primary School, where in most of the surveys we find as criteria: the public game, joint activities, sharing something, as well as the readiness to help, while criteria for rejection of their classmates are: violence / aggression, annoying behaviour and conflict for an object.

This research through teacher's observation and children's references showed as criteria for selecting students of the classroom in the following order: friendship among children; socialisation of the child (e.g. popular); emotional expressiveness; affinity; shared experiences (coexistence of the nursery, living in the same village / neighbourhood, participation in the same extracurricular activities such as dance or football); personality (mature, coherent); common interests; level of learning; appearance (cleanness, nice clothes); leadership skills. On the other hand, criteria of rejection are: annoying behaviour; aggressiveness; verbal aggressiveness; poor performance in courses; past bad experiences; poor interpersonal relations; appearance (sordid clothes, hair, lice, body weight); indifference for the lesson and learning activities. Finally, the criteria that can characterise a student as neglected, are: reduced social behaviour; non-existent interpersonal communication; non-expressiveness; reduced confidence; reduced or non-active participation in the lesson.

B. Overview of class

We do not detect "cliques" to be created in the classroom, but only a few mutual preferences, most of which are positive. The function of the order has normalized enough, but what is detected compared with the first and second application of the test is that: a. the popular students have been increased; b. the neglected and the rejected have been increased; and c. the controversial and the average students have become less. This seems to suggest that with the efforts and interventions of the teacher, the collaborative spirit and cohesion social in this classroom has been increased, but the gap between the first and the last students has grown. So, the open

issue of Sociology of Education regarding equality opportunities in education surfaces again, which transforms to an unequal / greater supply of assistance to the trailing (differentiate and individualised teaching). Also it is apparent from this survey that when the function of the classroom is being democratised, they all develop better, and those who start from a better basis are favoured even more. However, in the specific classroom there were some students who showed a behaviour that was difficult to detect by simple observation of the teacher and his subjective approach or even the simple analysis of sociometric matrix, instead comparative quotations between the four matrixes were needed, namely between the first two (first application) and the second two (second application). These comparisons yielded many of the above mentioned results and created the conditions for educational interventions.

Conclusions

In this research-action the interviews and sociometric tests created favourable conditions for research and intervention in the process of socialisation and political socialisation of the classroom. At the same time this research provided interesting results, which alone may not be of general applicability, but with their presentation to the scientific community and with further comparative approach, they will become evidence to elongate sociological and educational science and truth.

Important conclusions, some of which require further study are:

a. It was clearly revealed from this research that the subjectiveness of the evaluation–judgement–expectation of the teacher needs support to become more objective and useful. As the first and second interview–prediction of the teacher for the popularity of his students although generally successful, it included several errors which were less or more important and also they document the deficit of the subjective evaluation and the great need of subsidiary objective measurement, which is provided by the sociometric tests in combination with other forms of qualitative research recording. The enthusiasm of the teacher for participating in research-action was big, and as a result his mobilization was evident both from his activation, and the results of the second application of the test. But, on one hand the second prediction was too optimistic and on the other, the realistic acceptance of reality, finally led the teacher to the acceptance of the need to carry on with the efforts in the classroom because some stereotypes are well rooted in the mind of students and it is difficult to be eradicated from it.

b. The use of multi-methodical approach is indeed very useful in social research (Cohen, Manion, 1994: 321), so the variety of methods (research-action, sociometric test, interview) provide unlimited help into spotting weaknesses of both students and the classroom as a whole, as well as creating teaching tools to address these problems. The intersection of the results of tests revealed weaknesses of the classroom, the students and the composition of the research-action and interviews enabled a researching and intervention effort with wonderful results.

c. The effort to identify the difference between socialization and political socialization -social and political skills- (empathy, leading ability) showed that students in the second grade can both understand and distinguish these different skills of human personalities.

d. Intercultural education still requires significant effort, with specialized programmes and education of the teacher in order to reach its full potential in this classroom and generally in the Greek school. This is because the knowledge-centric school orientation and the societal prejudices, showed once again that, despite the efforts of the teacher, poor school performance and learning difficulties of weak students stigmatize them and consequently they affect the rest of the students, who are influenced by their learning and social environment (parents, neighbourhood) and so they become interested more in their progress and learning performance than in the development of their sociability and their social skills, such as empathy and acceptance of the different.

e. That class needs further care and educational intervention, while further research will be very helpful and very interesting.

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Appendix

Matrix sociometric test

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Faculty of Education
Department of Preschool Education

Sociometric test	
Primary School of Rethymno	**School year: 2010-11**
Classroom: B	**Total No. of students: 17**
Name of pupil: .... (…)	
(Name) (Initial letter adjective) (alphanumeric)	
Father: Occupation:	
Education:	
Mother: Occupation:	
Education:	

Question 1: Leadership	
Your teacher has to leave the classroom for a while. Which one of your fellow classmates do you think that could take his place for a while? Can you think of someone else instead? Who else? Who else?	
(First application)	(Second application)
1 .... 2 .... 3	1 .... 2 .... 3 ....
For the same reason, your teacher has to leave the classroom for a while. Which one of your fellow classmates do you think that could not take his place for a while? Who else? Who else?	
(First application)	(Second application)
1 .... 2 .... 3	1 .... 2 .... 3 ....

Question 2: Sympathy	
You have agreed with your mother to invite some of your classmates over at home on Saturday. Which one of your fellow students would you prefer to invite? Who else? Who else?	
(First application)	(Second application)
1 .... 2 .... 3	1 .... 2 .... 3 ....
For the same reason, you have agreed with your mother to invite some of your classmates over at home on Saturday. Which one of your fellow students would not like to invite? Who else? Who else?	
(First application)	(Second application)
1 .... 2 .... 3	1 .... 2 .... 3 ....

HAMID RASHIDI, ABBAS MADANDAR ARANI, LIDA KAKIA

E-LEARNING, STATE AND EDUCATIONAL SYSTEM IN MIDDLE EAST COUNTRIES

Abstract

E-learning has provided men with new opportunities in teaching-learning procedures. A historical review of educational systems literature reveals that e-learning has spread out among people much faster than any other learning methods. E-learning as a state-of-the-art technology, has caused great innovations in materials development in those societies in which new methods and procedures could hardly ever been accepted. Technological innovations and the development of tele-communications such as Television Stations and Channels, Satellites, Mobile, and Internet have made it possible for the children and teenagers in the Middle East to access to the latest news and information. Of course, these developments have endangered both political and educational systems in some aspects. The present paper while pointing to some of the recent development in the field of e-learning in the Middle East, tries to examine the political and educational systems reactions to this phenomenon.

Introduction

E-learning has not only affected youth's methods of learning but also has modified the relations between social structures and young generation. The application and genesis of mass communication and its outcome which is Electronic Learning has made some sorts of information accessible to the young people (Wilson, 2001). For centuries, being grown up and experienced was a basic and needed factor in the Middle East to gain access to such kind of information. Nowadays, this modification in an ancient area is to such an extent fundamental that everybody should give priority to that.

During the last century, emergence of Radio, Newspaper and TV had a kind of tremendous effect on the connections between grown up young generations of society. The history of 50 years of social transformation in the Middle East distinctly shows how each one of these new medium has increased anxiousness and tension in parents, teachers, politicians, and clergymen. It has also widened the extent of misunderstanding among generations. Today, we are confronting with a new phenomenon called the genesis of Internet and E-learning. These new technologies have affected security of traditional societies in the Middle East. As a result, the act of learning has turned into a national - security issue (DSES International Forum, 2007). It has been turned into a security issue because the sense of equilibrium which has been prevailing in the relation between last and new generation, has been lost.

Parents do not feel secure any more because their kids, quickly and before the appointed time become familiar with the relationship between different sexes. They believe that their children communicate with strangers and play a number of games which are not only time-killers but bothersome and annoying. Politicians do not feel secure because they are not able to exercise their influence on young generation as

the only eternal political source. They have to fight with their political opponents both in the field of practice and the virtual world. To the politicians, in this critical region, nothing is more perilous than the minds of the young people crammed with opponents' ideas. Finally, these are the teachers and educationalists that will not be considered as the only right sources and criteria for gaining knowledge. They can surpass their teachers in acquiring new information.

E–Learning

In the Middle East, none of the current ways of teaching and learning is considered more fascinating than E-learning. The reason is poor economical condition, cultural and social impediments and lack of an able and fascinating method of learning. Historical experience in developing countries such as Middle East countries shows that lack of financial sources in procuring costly installations is the main reason (Coombs, 1985) but the increase in the oil price in 1970s, made some of the countries in this part of the world enabled to solve this problem to some extent. These countries compare to other developing countries have been empowered to build new schools and equip them with new technologies (Mideast Youth, 2007). The second impediment for the acceptance of these new technologies is the social and cultural prevention of these societies.

Opposing to new technologies, overestimation of negative aspects of their application, and disinclination of families are some inextricable specifications of the societies in the Middle East. Surprisingly, it should be acknowledged that internet has created an ideal ambiance for all children, juveniles, girls and women of all classes of society. It has given this chance to young generation to not only observe traditional limitations of their societies but also make contact with others easily. They believe Internet has been able to present a new view and meaning for some of Islamic concepts such as Hijab (Veil), Meraj (Ascension), Hijrat (Migration), global brotherhood, equality of women. Consequently, it should be said that E-learning has overthrown cultural and social obstacles to some extant. It has been accepted quickly among families and instructional settings.

As a matter of fact, in compare to other educational technologies, there are two reasons for young generation's enthusiasm towards learning through Internet. These are: little cost and lots of attraction. In spite of some shifting views among adults about children and the Internet in the Middle East, the overall responses continue to supply a broad range of strongly positive views about the benefits of Internet use -- especially about its value as an information source, and its growing use for involvement in online communities (Center for the Digital Future, 2008). Because of social, cultural and economical restrictions in traditional societies such as Middle East, old information methods could not provide people with appropriate learning opportunities. This problem has been resolved by e-learning. During a period of 7 years (2000-2007) Middle East countries have got a considerable growth in usage of internet. Their growth is equal to four times global growth at the same period (Da-Wei, 2007). In fact, the Middle East is an upcoming market as experts suggest today, even though major western e-learning and IT suppliers expanded their boundaries into the Middle East years ago.

State

We do believe that the politicians and statesmen in the Middle East more than any other social groups may understand McLuhan (1964) who says "We make our instruments and then these instruments will make us". This quotation shows the role of new information and communication technologies and their impacts on citizen from the view point of politicians (look at Arabic Spring). This issue originates from the fact that since 1870 to the early 1970s, technology has tended to facilitate centralization. Railroads, mass production, the telegraph and telephone all helped those at the center draw in and control the periphery.

Today, ICT is having the opposite affect, facilitating the decentralization of power. The rise of the service economy, the development of the Internet, satellite television, and growing mass literacy are all strengthening the periphery at the expense of the center (Dahan, 2002). In fact, e-learning creates an atmosphere to gain information which politicians are not interested in. This show that politicians, statesmen and political structures are very concerned about youth's access to the websites which are in stark contrast with their own objectives and entity. Consequently, they have tried to use filtration to impede youths from access to those websites. Of course, some of new statesmen on their way to gain power have benefited form using technological revolution. So, we conclude that both who are in charge of states and their opponents benefited from using internet website and satellite TV channels to do impact on next generation of society.

Educational System

Amalgamation of citizens in this part of the world shows that children and young people form a considerable part of age pyramid of population. Educational system is one of the first among social structures which is under the impact of this constitution. During the last two decades, educational systems have seen the increase of registration in all academic levels. For example, girls form more than 60% of all university students in Iran and more than 90% of graduate students in high schools of UAE register at colleges and universities (Arani & Abbasi, 2008). Anyway, increase in usage of e-learning is not limited to the universities only. We can see the access to e-learning even in people with lower levels of age. Available citations show that educational systems of Iran, Kuwait, UAE, Israel and Turkey are under the influence of global privatization and therefore the number of kindergartens, elementary and secondary schools connected to the Internet are increasing (Internet World Stats, 2007).

Today, teachers in the Middle East are observing that Internet has been gaining popularity among young people, though at a much slower pace than television and radio. In addition, experimental evidence shows that in the Middle East there are so many more computer-literate young people than adults indicates the younger generation's greater interest in and aptitude for technological advances. Educational system should make an attempt for not being retarded from children and young people.

Conclusion

We could not forget this reality that many children and youths in the Middle East appreciate Internet contents that deal credibly with topics they may find difficult to discuss with parents or adults, such as personal relationships, sexuality, AIDS, drugs, self esteem, etc. In addition, the youth in countries with widespread poverty, corruption and political turmoil also seek realistic, relevant and meaningful content to help them understand and cope with hardships they face in their daily lives (Gigli, 2004). This fact demonstrates that youths do not bother more about parents, political or religious leaders' confirmation. Also, through avoiding any exaggeration – either positive or negative – on the effects of Internet, regional differences should be taken into account. As a matter of fact, family income has a major effect on the level of literacy of the people to information technology and also to their access to Internet. Use of Internet requires a fairly complex set of skills and technology which is not always available for many youth people. Therefore, we should avoid of exaggerating about Internet affects on youths in the Middle East.

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APPROACHES TO INTERNAL TESTING AND ASSESSMENT OF KNOWLEDGE IN RELATION TO THE PUPILS' ACHIEVEMENTS IN NATIONAL ASSESSMENT OF KNOWLEDGE

Abstract

In this article we are presenting the results of the research "The Connection between the Results in the National Assessment of Knowledge and the Pupils' Socio-cultural Environment, Instruction and Homework", taking place at the National Education Institute, Slovenia, in the years 2008/2009. In the introduction we are writing the importance of national assessment of knowledge in the primary school and presenting its significance in certain European countries. External knowledge assessment at the end of the primary school, being at present in Slovenia called *national assessment of knowledge,* has got since 2005/2006 an information and formation significance. The achievements in the *national assessment of knowledge* are not a part of the school mark, but additional information on pupils' knowledge.

In the central part of the article we are presenting the findings of the study on the interconnectedness of approaches to internal (school) testing and assessment of knowledge with the school success of pupils in the national assessment of knowledge in mathematics and Slovenian language. The research has shown that none of the single elements can have a decisive influence on the results by itself, but rather interdependence between them. A change of one element can influence the structure and efficiency of other elements, thus their consistency is required. The results also show that pupils make differences between teachers of mathematics or Slovenian language, i.e., a closer cooperation with mathematical teachers than with Slovenian language teachers.

Key words: national assessment of knowledge, Republic of Slovenia, mathematics, Slovenian language

Introduction

National assessment of knowledge is in a number of school systems, besides the internal evaluation and international comparative studies, as for example PISA or TIMSS, one of the mechanisms for determining the quality of education (Markelj and Majerič, 2009). By way of external testing of knowledge we can gather various information, e.g., on individual's, on average results of pupils from different schools. The significance and impact of national assessment of knowledge is many fold and includes the creation of school policy, ranking of school children upon school entry, evaluation of school system efficiency and improvement of school practice (Zupanc, 2005).

The external testing of knowledge at the end of primary school has in Slovenia taken place for two decades and its description and purpose of assessment have been changing. Upon the introduction of *National Assessment of Knowledge* in the school year 2005/2006 the role of external examinations changed again. The national

assessment of knowledge has since 2005/2006 lost its selective function and kept the informative and formative function. The results in national assessment of knowledge are no longer a part of school marks, and they neither influence the entry to secondary schools with limited entry, but function as additional information about pupils' knowledge being important for pupils (primary schools send a written notice to parents about the pupils' results in the national assessment of knowledge), for teachers and for the schools pupils attend, and also for the schools pupils intend to enter, and the entire results have been interesting for the state and the state institutions being responsible for education at national level.

When we speak about *internal testing and assessment of knowledge* we primarily think about testing and assessment of knowledge, done by each teacher in his class either orally or in written. This was on the basis of questions prepared by themselves and without any additional information on comparability of the characteristics of such testing with other teachers working at other schools, as well as on the comparability of results of such testing and assessment – school marks – with others (Žakelj and Grmek, 2010). External examinations and assessments are understood as verification with tests, composed by educational experts and experts for measurements, i.e., for the composition and analysis of measurement instruments. Basic features of external testing and assessment are as follows: all pupils solve the same or comparable exercises; equal criteria of testing administration are in place; tests are at least to a certain degree metrically verified (Bucik, 2001).

Knowledge assessment, the purpose of which has in the past merely been of informative character, and in the function for selection and repression purposes, has more and more been oriented to educational and motivational purposes emphasising the stimulative role of marks and teachers' as well as pupils' participation in decision making process in organisational and thematic aspects (Strmčnik, 2001). The result of assessment is final mark. The assessment encouraging the best mark, taking place in the context of class events, besides numerical marks implement qualitative descriptions of learning achievements (Ivanuš Grmek and Javornik Krečič, 2004). The mark "good" tells little to pupils about what knowledge they master well and what they do not. With the help of descriptive criteria for determining knowledge learning results pupils achievements may also be described as follows: we emphasise the quality of individual result, qualitative descriptions make it possible to understand achievements in relation to pupils' abilities, their former results and in relation to the context. They serve to both, teachers and pupils for teaching and learning, for setting learning objectives and, of course, to establish the final mark. Žakelj and Magajna (2003) determined a selection of general criteria for mathematics, for planning of teaching process for mathematics, as well as to formulate the feedback information for pupils about their acquired knowledge. First of all they identified the areas to be monitored: pupils' understanding of concepts and procedures, of communicating and solving as well as studying problems.

When selecting areas it is necessary to be careful about including only those areas that we want to test, i.e., the knowledge, skills and competences, we want to encourage, and which are based on the subject objectives. We have to avoid choosing the most obvious, easy recognisable areas showing only the most evident successes and failures of pupils and neglecting those areas that show a universal

comprehensive achievement while fully respecting the ways (processes) which bring the result (Sentočnik, 2004).

The qualitative criteria do reach their objective if they are presented also to pupils. Pupils are expected to know them in advance, before dealing with a certain learning contents. Teachers use them when *planning activities* for instruction as well as for the production of the feedback information for pupils about their acquired knowledge. Teachers use them to present to pupils the achieved objectives and learning results, to point at pupils' potentials or possible gaps in their knowledge. This way, teachers by using descriptive criteria, through a dialogue explain to pupils the mark from a qualitative aspect and not only on the basis of collected points.

All these moments make an important contribution to the democratisation of the relationship between pupils and teachers as well as to a more active attitude of pupils to learning and assessment of knowledge. And teachers who encourage pupils to active participation in the instruction and combine learning and teaching, testing and assessment, acquire during this process qualitative feedback information on pupils' advancement (Marentič Požarnik, 2000).

Methods

Teachers carry out testing and assessment of knowledge quite differently: some of them regularly establish assessment criteria, present them to pupils, explain marks to pupils, discuss with pupils the testing results, others do that very rarely or never. Furthermore, teachers give pupils directions when preparing for instruction. They give homework to pupils regularly, systematically or only occasionally; some of them announce the content and the assessment criteria, others do that only occasionally.

In our research we focused on the following:
- what is the connection between pupils' results in the *national (external) assessment of knowledge* in mathematics and Slovenian language, and the approaches in the internal (school) testing and assessment within the instruction of mathematics and Slovenian language;
- are there any differences in the knowledge testing and assessment approaches between the teachers of mathematics and teachers of Slovenian language, and if yes, what are those differences.

For our study we implemented the descriptive and causal – non-experimental method of empirical researching. The sample covered 1454 pupils coming from the ninth grades of Slovenian primary schools, from which 54% of girls and 46 % of boys. Questions in the questionnaire referred to the approaches of teachers to testing and assessment of knowledge. Part of the questions was logically adapted from the questionnaires on *Identifying and providing quality assurance for National Examination Centre of the Republic of Slovenia and the study PISA 2006* (OECD, 2007). The implemented survey questionnaire contained provided measurement characteristics and is sufficiently reliable.

We statistically processed the data in line with the purposes of the research with the help of programme packages SPSS, RUMM2020 and R 2.8.1. We implemented: basic descriptive statistics, Pearson's correlation coefficient, Wilcox test of differences with predetermined rankings, the reliability analysis through classical testing theory (Guttman-Cronbach coefficient α).

Results

Marks for mathematics and Slovenian language in the 7th, 8th and 9th grade

In connection with this question we focused on final marks of pupils from seventh to ninth grade in mathematics and Slovenian language and then the connections with the results in the national assessment of knowledge. Both, in case of mathematics as well as in case of Slovenian language the number of marks "sufficient" increases from the seventh to the ninth grade, and the number of "excellent" marks from the seventh to the ninth grade decreases a lot, both in mathematics and Slovenian language. Similar results are provided by the Slovenian Statistics Office for the school years 2004/05, 2005/06 and 2006/07 (http://www.stat.si).

The number of excellent marks slightly increases in mathematics on the ninth grade compared to the eighth grade, and in Slovenian language the number of excellent marks from seventh to eighth and from eighth to ninth grade decreases.

The correlation coefficients between the marks in all three grades and the results at the *national assessment of knowledge* are increasing from grade to grade, both in mathematics as well as in Slovenian language and are from $r_{xy}=0.63$ to $r_{xy}=0.68$ in Slovenian language and from $r_{xy}=0.67$ to $r_{xy}=0.71$ in mathematics. Thus, we have an important statistical connection between the final marks in Slovenian language and mathematics and the results of the *national assessment of knowledge*. On these grounds we could ascertain that the marks given by teachers both in mathematics and in Slovenian language are quite objective and have therefore a very good announced value for pupils' success in the *national assessment of knowledge*.

Teachers' approaches to testing and assessment of knowledge

We asked pupils what statements are true for Slovenian language teachers and for teachers of mathematics in reference to their approach to testing and assessment of knowledge. We were interested in whether teachers while testing and assessing knowledge tell pupils what they are expected to know for questioning and written exams; whether they present criteria already before the written assignment; if they explain criteria for oral assessment; if they show any example of good exercise or bad exercise after the written exam; whether there are a lot of bad marks in written exam, if there is more repetition and consolidation in the following lessons and if teachers talk with pupils; and also if teachers help them to improve their knowledge in case there are a lot of low marks.

Approaches of teachers of Slovenian language and mathematics to testing and assessment of knowledge

The results show that a lot of teachers both for Slovenian language and mathematics tell in advance the content of testing and knowledge assessment, but not the criteria for testing and assessment. Hence, 67.0 % of pupils think that Slovenian language teachers often or always tell in advance what they are expected to know for testing and assessment, and in case of mathematics only 73.0 % of pupils agree with it. According to the opinion of pupils majority of teachers do not present the criteria for written exams in advance. Thus, only 27.0 % of pupils think that teachers of Slovenian language often or always present assessment criteria before the written exam. In case of mathematics this percentage is slightly bigger,

however, even for mathematics only 40.0 % of pupils think that teachers of mathematics often or always present criteria of assessment before written exam.

Pupils' answers show that a discussion on reasons for failure in examinations and the presentation of more or less successfully written tests of individual pupils selected by teachers is not a usual practice in the instruction of mathematics and Slovenian language.

Only 32.0 % of pupils claim that Slovenian language teachers often or always show examples of good or bad assignments. And in case of mathematics this activity is recognised by 43.0 % of pupils. Mathematics teachers decide slightly more often than teachers of Slovenian language to discuss problems and for more consolidation. In case written exam results in several low marks, 43.0 % of pupils consider that teachers of Slovenian language often or always talk to them about the reasons to this situation. And in case of mathematics such activity is detected by 53.0 % of pupils. There is also more repetition and consolidation in mathematics than in Slovenian language. Following the opinion of 46.0 % of pupils they have more repetition during the next lessons when there are more low marks**.** And in mathematics this teachers' activity is noted by 60.0 % of pupils.

Most of the correlation coefficients among the enumerated variables and results in the national assessment of knowledge in mathematics and Slovenian language ranged between 0.000 and 0.114, which could have meant that the stated factors did not have a direct connection with the results of pupils in the national assessment of knowledge. From this we may conclude that none of those factors has a decisive impact. Low correlation coefficients between the above enumerated variables and the results in the national assessment of knowledge should give us an incentive to carry out further research work on the approaches to the testing and assessment of knowledge having influence on the quality and sustainability of pupils' knowledge.

And on the other hand, we should be aware of the fact that pupils often experience instruction differently from teachers' expectations which entails different answers of teachers and pupils to the same questions so (Ivanuš Grmek et.al., 2007, Kalin et.al., 2009); we should, therefore, pay much more attention to joint reflection on learning process, what has been often referred to by Cencič (2009).

Comparisons between the approaches of Slovenian language teachers and teachers of mathematics

As it may be seen from the ranking averages, teachers of mathematics more often than Slovenian language teachers do the following:
- tell what pupils should know,
- present assessment criteria,
- after assessment show examples of good and bad exams,
- have more repetition in case of bigger number of negative marks and talk with pupils about the reasons for a given situation,
- last, but not statistically significant, they also explain more often the oral marks to pupils.

To sum up, in terms of larger cooperation with pupils the results unveil advantages for teachers of mathematics, in comparison to Slovenian language teachers, what concerns their approach to testing and assessment of knowledge.

Discussion

The study results have shown that marks at schools, both in mathematics and in Slovenian language, have a high predictive value also for the success in the *national assessment of knowledge*. As regards the teachers' approaches to testing and assessment of knowledge the study has shown that a large number of Slovenian language and mathematics teachers convey the contents and assessment criteria in advance, and also tell *what pupils should know* in case of questioning and written exams; both often explain the marks pupils get in oral assessment, however, they more rarely explain criteria for written assessments.

In case of teachers' telling pupils in advance what they should know, there are significant differences between teachers of mathematics and Slovenian language teachers. Teachers of mathematics statistically significantly more often tell in advance what pupils should know than teachers of Slovenian language. As regards explaining oral assessments there are no statistically significant differences between teachers of mathematics and Slovenian language. Both often explain oral assessments.

Discussion about the achieved results, about the reasons for success or failure, about criteria of assessment, significantly contribute to the increase of learning motivation, to the building of one's knowledge and consequently to the increase of the knowledge assessment culture. Facing different views or oppositions with arguments disagreement stimulates pupils' curiosity and cognitive conflict, having impact on conceptual changes. Various solving strategies usually include also different contents and thus make it possible to have an insight into the interconnection of knowledge.

How pupils will tackle certain exercises and what relation they will have to the learning subject cannot be influenced only by their values and interests; an important moment in providing pupils' active participation in the instruction is contributed also by teachers' actions (Žakelj, Grmek, 2010). For pupils' advancement correct feedback that is conveyed by teachers is vital. Teaches have strong influence on the pupils' inner motivation as well as on the acquisition of deeper knowledge also through their approaches to how they convey to pupils feedback information on the attained knowledge. Teachers use of descriptive assessment criteria for describing and explaining marks and teachers' actions, when they talk with pupils about why their knowledge was insufficient, may have, if they are well prepared and transferred, an explanatory and applicative power, which enables pupils to have an insight into their own achievements (Rutar Ilc, 2008). Solely formalistic presentation of marks and collected points in tests do not touch very much pupils' attitude towards how to learn a certain subject; sometimes they may even have a negative impact on their relationship to knowledge (Marentič Požarnik, 2000).

This information reminds us that teachers should pay more attention to talking with pupils about the assessment criteria, about typical mistakes in the exams, and also for explaining marks to pupils. All this significantly contributes to the enhancement of pedagogical approaches in the assessment of knowledge (Gipps, 1994) and to the increase of knowledge assessment culture. Here it is important to stress the quality of each individual result, and the qualitative description should help pupils understand their results in relation to their capability, their previous achievements and to the context. (Ivanuš, Grmek, Javornik, Krečič, 2004).

On the other hand, the formation of pupils' views is largely influenced by external factors. The researchers (Caplan, Choy and Whitmore, 1992), who found out surprisingly high results of Indo-Chinese refugee children in American schools, attributed pupils' high results to values. The above mentioned authors ascertain (ibid), that the pupils' success is closely influenced by dynamic and motivational dimensions, since they represent the objectives we are striving for. Musek (1993) also underlines that values are an important regulator of behaviour, since they influence the assessment of phenomena and making decisions for action. They represent a certain kind of standards on the basis of which we measure and evaluate things. For the parents of children coming from middle and higher social classes it seems logical that their children will continue their education which again influences children's learning motivation (Robertson, 1989). The ambitions of parents and their expectations regarding their children's education are important. Interviews with parents have shown that they are fully aware of how important education is for inclusion into a new environment, though they did not have it themselves. (Caplan, Choy and Whitmore, 1992). They believed that their children will influence their own destiny through their diligent learning, which does not depend only on pure luck, but also on persistence and effort.

If we take a look at knowledge from a broader perspective, we cannot avoid the interpretation which places knowledge into a wider context, where the so called demonstrated knowledge is not influenced only by the instruction quality, but this variable is joined also by several other variables as for example, the quality of pupils' lifestyle, encouraging or discouraging environment where pupils come from (Toličić and Zorman, 1977; Serpell, 1993; Malačič et. all, 2005; Žakelj at. all, 2009; Žakelj and Ivanuš Grmek, 2010), as well the intellectual abilities of each individual (Marjanovič Umek at. all., 2006). Education, and creativity linked to it, as well as social context are intertwined among them and compose a wide range of factors that influence the performance of each individual at school and later on his vocational status.

Conclusion

The pupils' results in the *national assessment of knowledge* are important feedback information for teachers and school leaderships since they can on the basis of deepened analysis of results, which their pupils achieved in the *national assessment of knowledge,* think more deeply about learning and teaching and on these grounds prepare the strategy for the improvement of work. We can learn from the results of the *national assessment of knowledge* what are the advantages and weaknesses in the knowledge of a certain class, school and in general. Fully respecting other factors (e.g., social structure of population, proportion of pupils for whom Slovenian language is not their mother tongue, the share of pupils with special needs) we can make conclusion on (in)adequacy of conditions for instruction (curricula, textbooks, teachers' qualification and training, etc.), which is the first step towards the improvement of learning and teaching. Here, one should not overlook, that also social and cultural environment in which pupils are embedded significantly influences the quality of pupils knowledge; this has in the recent years also been pointed at by the fact that the average results of the national assessment in some Slovenian regions are significantly lower than the national average and than

the average results reached by pupils in some other regions (Žakelj and Ivanuš Grmek, 2010).

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THE STEREOTYPES IN PUPIL'S SELF ESTEEM

Abstract

Through the influences of our social environment, both boys and girls learn their sexual norms, specific rules and values from the early childhood. Hence, children grow up in the world of distinct sexual duality. In their efforts to act according to their sexual stereotypes, children adopt these widespread stereotyped conceptions in developing their self-image. This includes behaviour, emotions, and the role that each child connects with his/her own self - all in accordance with the accepted male and female image. In this comparative study, we tried to determine how fourteen-year-old schoolboys and schoolgirls in Slovene, Austrian and Croatian elementary schools evaluated the spheres of free time activities, domestic chores and schoolwork, and personal traits, characteristics and conduct. This study provides relevant information about the image of schoolboys and schoolgirls in the seventh grade, and shows the answers given by the girls are closely related to the sexual tendency of self-image and the image of the opposite sex.

Key words: pupils, field of activities, free time, stereotypes

Introduction

Sociologists determine sexual stereotypes as cognitive structures which comprise of socially determined knowledge of either feminine or masculine characteristics (Ashmore, Del Boca, Wohlers, 1986). These represent semantic schemes which influence social conduct and rely on patterns of perception through which individuals organise their social experiences. Concurrently, they reduce a great number of expected conduct and classify important patterns of conduct. Stereotypes express culturally important patterns which enable mutual conduct of individuals. Cultural and social meanings of sex influence the standpoint of an individual. These viewpoints express the individual's expectations and constitute the structure of needs with both men and women, and hence, represent a part of the individual's sexual identity.

Young people pay more to specific areas and activities of interest according to their ideals, orientations, daily tasks, and their ability and knowledge. The areas of interest the youth participate in can be interpreted as "spheres of action" or spheres in which these young people present themselves in view of their sexual concept, and including well thought out gender-related behaviour. Attraction to the specific spheres is amplified if it coincides with the individual's self-image, which suits notions and desires of the individual's own personality and nature.

In this comparative study, we tried to determine how fourteen-year-old schoolboys and schoolgirls in Slovene, Austrian and Croatian elementary schools evaluate the spheres of free time activities, domestic chores and schoolwork, and personal traits, characteristics and conduct. We wondered which activities and the types of characteristics or traits are attributed to oneself or the opposite sex. Are there any differences and if so, what are the reasons? The aims of the study are to explore:

1. Which free time activities are selected by schoolboys and schoolgirls for themselves and for the opposite gender, and the differences and reasons for their specific decision?
2. How schoolboys and schoolgirls evaluate the sphere of domestic chores: what is considered suitable for boys and for girls?
3. How schoolboys and schoolgirls evaluate the sphere of schoolwork: what are boys and girls better at?
4. Which characteristics, traits and conduct are attributed to schoolboys and schoolgirls: which are appropriate for the opposite gender?
5. Any such differences in the evaluation of the activities or characteristics among schoolboys and schoolgirls between those who live in urban or rural areas?
6. Any such differences in the evaluation of the activities or characteristics among schoolboys and schoolgirls who live in Slovenia, Austria and Croatia?

Method

The poll was conducted in Slovenia, Austria and Croatia. In each country, the study included five elementary schools selected from urban areas and five elementary schools from the rural settlements. Schools were randomly selected; nevertheless, we tried to consider specific living conditions. The urban schools we selected were located in Ljubljana, Klagenfurt and Zagreb, while the rural schools we selected were in rural communities (in the case of Slovenia and Croatia), or the urban outskirts (in the case of Austria). We planned to include twenty schoolboys and twenty schoolgirls, aged fourteen and in the seventh grade, from each of the five schools. The total number of pupils tested in a sample we analysed was 1130: 585 schoolboys and 545 schoolgirls. 51.2 % attended urban schools and 48.8 % attended schools in rural or outlying settlements.

Similar tests by Valtina and Klopffleisch (1996), Biskup in Pfister (1991, 1999) and Zipprich (2001), who researched only a specific field in their studies, were taken into account when designing our questionnaire. We were able to establish with our questionnaire which activities and characteristics schoolboys and schoolgirls attributed to themselves and to the opposite gender. This consists of four subspaces: the sphere of free-time activities (sports and cultural activities), the sphere of domestic chores, the sphere of schoolwork, the sphere of personal traits, characteristics and conduct. The factor analysis component model was used in defining the validity of the measuring instruments. We discovered the existence of statistically distinctive differences of all tested groups and emphasised those dimensions which contributed to the fact that the differences among the groups are statistically distinctive.

Results and Discussion

We interpreted the basic points of variable distribution according to separate spaces. Furthermore, we concentrated on the top five answers as to the estimated degree of characteristics when comparing results. In the continuation, we present findings which display dimensions in which schoolboys and schoolgirl differ according to their place of origin, their country of residency and their gender. Firstly, we will present the sphere of sports. Analysis shows that the selection of

different sport activities in the seventh grade regarding both genders in all countries is related to a large amount of male and female stereotypes which are based on social and cultural circumstances specific to each country. Typical male-oriented sports are swimming, football, seven-a-side, basketball, while typical female sports are dance, badminton, callisthenics, volleyball and beach volleyball. Sports activities which dominate within one gender group are not accepted with the opposite gender. Zipprich (2001) came to similar conclusions. Girls are slightly more open-minded and are interested in male-oriented sports, whereas boys are not as reciprocal to "female-oriented" sports.

We included cultural activities and festivals among activities in the individual's free time. Similarly, with the sports sphere both schoolboys' and schoolgirls' answers are closely linked with the tendencies specific of a particular gender group regarding self-image, and affirmed self-image of the opposite gender. Boys and girls from the three countries believe that going to the cinema, attending home parties, discos, pop concerts, watching TV and going to the library are suitable activities for both parties. Boys also place attending sports games quite high. Less suitable activities for both genders are: going to the theatre, fine art openings and classical concerts, participating in drama clubs or choirs. Greater conformity about domestic chores, which is thought to be more suitable for girls, is unanimous between Slovene and Austrian schoolboys. The most suitable tasks for girls are cooking, shopping, tidying up, dusting and watering flowers. Slightly lesser values of domestic chores are expresses by Croatian schoolboys. Less suitable tasks for girls are domestic up keeping, mowing the lawn and riding a motorcycle. Girls believe that dusting, gardening and tidying the home is equally suitable for boys of the same age. Again, Slovene girls strongly affirm these statements, while Austrian girls follow and Croatian girls appear to have slightly lesser values in their answers.

A stereotypical image generally attributed to girls and boys can be seen in the sphere of scholastic skills. Schoolboys attribute neat handwriting to schoolgirls who exceed in drawing and school achievements. Slovene and Austrian schoolboys strongly complied with the first two traits, while Croatian schoolboys did not emphasis the two traits much. In defining foreign language acquisition, all schoolboys from all three countries consider themselves to have a moderate ability, yet quite balanced assessors. Their opinions become rather dispersed when attributing mathematical skills to girls. Slovene schoolboys admit that the degree of acquired skills is high, while Austrian schoolboys are not such generous in their opinion. Girls on the other hand do not share the same opinion of their schoolmates. The girls attribute achievements in mathematical skills and emphasised scholastic achievement and knowledge in social and natural science, and acquisition of foreign languages. It may seem astonishing that when evaluating all spheres in a positive manner, Slovene schoolgirls exceeded the other girls from the other countries. Fellow schoolgirls from Austria were much more lenient assessors, and accentuated that their schoolmates are very successful in school, and emphasised their ability in second language acquisition. It may prove interesting that fellow schoolgirls from Austria and Croatia are far more withheld and entirely unified. Schoolgirls from Croatian schools exceed in all areas as more critical assessors of their schoolmates.

At the end, we will review the pupils' assessment of some personal traits, characteristics and conduct concerning themselves and the opposite gender.

Schoolboys from Slovene schools believe that their female classmates take great care of the body and in their physical appearance, and the boys equally like to talk on the phone and socialise as much as their fellow schoolgirls do. Schoolboys also do not deny their sensibility. Similar assessment was performed by Croatian and Austrian schoolboys, with the sole exception that the Austrians emphasised precedence of chatting on the phone over the physical appearance and concern for the body.

We tried to distinguish the differences in latent dimensions which determine free time activities (sports and cultural activities), the sphere of domestic chores and schoolwork, and the sphere of personal traits, characteristics and conduct which appear between countries, the residency and between genders, using of the multi-variant analysis of variance. Let us observe the differences among the countries. According to the results, we can establish statistically that there are typical differences defining boys and girls in all six subspaces. Regardless of the fact that Austria, Croatia and Slovenia present a relatively closed cultural circle, views of what is suitable for boys and girls differ subtly among the countries. One of the decisive factors is represented by a cultural orientation of a separate phenomenon. If we want understand these differences, which appear in the determined activities suitable for schoolboys and schoolgirls, we must consider their residency. It is of no surprise that the residency represents the variable in which statistically relevant differences in cultural activities and domestic chores exist between schoolboys and schoolgirls. This demonstrates that life in various demographic environments influence different perceptions of the world around the students, and hence, they evaluate their activities accordingly.

Traditional roles within the family are no longer compulsory and excusable as in the past in a more open society. Only exceptional modern couples play traditional roles. Each family member has to be more resourceful from time to time. This means having to wash the dishes, iron the shirt, change the fuse, tidy the flat or cook lunch, regardless of their gender. There is no other way; however, different viewpoints exist when determining what is important for girls and what is important for boys.

The next extension offers the possibility to discover distinctive divergence in activities and is represented by the gender. Schoolgirls evidently differ from schoolboys in determining: sports activities suitable for the opposite sex, domestic chores and personal traits. Schoolboys differ from schoolgirls in cultural activities, schoolwork and personal traits. We live in the society, in which the individual's self-image is defined through the body. In addition, it stands that everyone creates a different image about their own inferiority in relation to others. One example is the physically "perfect" group of people. Thus, it is not surprising that the differences in stereotypes between boys and girls are strongly expressed through sport. Such viewpoints from girls are more related to cultural determination of the society rather than the consequences of biological origin. All in all, last fortitudes of male dominance are decreasing even in the sport field. Women are taking interest in wrestling, boxing, playing rugby, lifting weights, and playing football, all of which reveal the picture of cultural and social societal functions. It is obvious that today the border between gender differences is slowly fading away even in the sports sphere where the differences between men and women have always been the most recognised.

Fixed stereotypical images are also exhibited with girls in the sphere of domestic chores: for which some have distinctly expressed the sharing of work

between the sexes. Boys differ from girls in their decision regarding cultural activities and school skills suitable for girls. Besides classical cultural activities, the importance of modern fun for young people was expressed. This would include going to discos and home parties. The culture of the young exposes and emphasises values of socialising and enjoying oneself. They are children of the consumer society which is proclaimed as the society of fun and recreation.

Conclusion

The study provides relevant information about the image of schoolboys and schoolgirls in the seventh grade. It reveals that the girls' answers are closely related to the sexual tendency of self-image and the image of the opposite sex. Findings show that the selection of activities defined in five spheres relates to the great amount of male and female stereotypes. School and other institutions would need to educate schoolboys and schoolgirls in becoming more critical to clichés presented in the study. This is applicable for all spheres; however, sexual images contain comparable and stable images which will linger since they enable social orientation. In addition, social orientation sustains the subsequent inequality and distinction in power between men and women.

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JOACHIM SCHROEDER

INSECURE IDENTITIES
UNACCOMPANIED MINORS AS REFUGEES IN HAMBURG

Abstract

This paper analyses the financial circumstances and social income of nearly one hundred unaccompanied minors who have come to Hamburg as refugees from various regions of Africa. It is based on extensive qualitative surveys, analysing their objective conditions of life and in particular their legal situation. A wide range of interview material and participative observations were used to obtain information on biographic courses and school and vocational careers of the young refugees over a period which extended to ten years in some cases, giving very detailed insights into their 'hidden lives'.

Fleeing, upheaval and coping

According to information from the Federal Agency for Migration and Refugees, some 30,000 asylum applications were submitted in Germany in 2009. Nearly half the applicants were less than 16 years old (45.9%), and one in five (22%) were in the 16-to-25 age group. So more than two thirds of the newly arrived refugees in Germany are children and young people. Based on statistics of the individual states and supplementary information from municipal authorities, it is estimated that there are between 5,000 and 10,000 under-age unaccompanied refugees in Germany, most of them in the big cities, especially Berlin, Dortmund, Frankfurt/Main and Hamburg.

Between 2000 and 2007, some one hundred adolescents and young adults from countries such as Sierra Leone, Togo, Somalia, Ethiopia, Guinea, Angola and Mozambique were interviewed several times on their educational perspectives, and their educational and vocational careers were reconstructed for the period since their arrival in Hamburg. In some cases we also accompanied them in their everyday activities in order to obtain detailed insights into their conditions of life. Some of these young people had only been in Hamburg for few months at the time of the first interview, but the majority had been living in our city for between two and five years. We have presented various results of the surveys in a number of German language publications (SCHROEDER et al. 2003; SCHROEDER and SEUKWA 2007; SEUKWA 2007).

We initially assumed in this project that the young refugees were exposed to insecurity in their subjective identities due to the loss of their home country, and due to their experiences in the course of fleeing; but we found that in fact what causes real problems for the young people is more the insecure status with respect to right to stay, and the comprehensive institutional exclusion of refugees in Germany. This article gives an overview of the legal and financial situation, and the social contacts of the young people, thereby presenting a wide-ranging even if somewhat depressing view of their "insecure identities".

Objective conditions of life and subjective assessments

For analysis of the life conditions of the young refugees interviewed, we concentrated on the legal situation, financial circumstances, and existing social network. For each of these aspects, we give a brief overview, and present individual life situations and subjective assessments by the young people on the basis of specific examples.

The Asylum Procedure Act (AsylVfG) stipulates that asylum procedure activities may also be applied to foreigners who have completed their 16th year of life (Section 12,1 AsylVfG). In fact this stipulation refers only to the classification of young refugees as fully capable of acting in their asylum procedures at the age of 16, but the Youth Offices and other authorities of many of the states of Germany, including Hamburg, derive from that stipulation the conclusion that the young people are capable of action in all respects related to matters of alien and asylum law. Young people with German nationality can benefit from youth status for purposes of care services and social support well beyond the age of majority, whereas young refugees tend to be subject to a reduction in the length of their youth status and the special youth support which is attached to it.

In the course of the interview, the young people were asked to give a subjective assessment of their legal situation and its influence on their motivation for education. The young people seem to be relatively *well informed* about German asylum and residence law, on the various regulations giving a right to stay, and on the consequences of the respective "stamp" for their opportunities to attend a school or obtain a work permit. On the other hand, they experience the asylum procedure, and particularly the decisions by the authorities on extension of their stay, as extremely *non-transparent*. The young people ask about the criteria applied by the authorities in making their decisions, and they are completely unable to say whether there are such criteria, or whether decision on them is made on purely subjective grounds in the respective authorities. Initially, the young people considered it self-evident that they would be permitted, or even required, to go to school on their arrival in Germany, but they soon realise that it is not possible in their own case. They have *learned* and *internalised* the fact that they are regarded by the German institutions not as "young people" but as "asylum seekers".

They see very clearly the *fundamental conflict* between the institutional goals of the educational system and those of the authorities. In the educational system their experience is that they are taking part in programmes and offerings designed to prepare them for integration into German society (learning German, getting their school certificates, vocational training); but in the asylum procedure and at the foreigners' authority their experience is that every effort is made to prevent this integration. Education takes *time*, and the Authority does not give them time – another inconsistency which they often mention (cf. also BREKKE 2004).

The *financial resources* available are enough to meet their basic needs – but not more than that. Asylum seekers in Germany receive support to pay for the costs of everyday life ("social benefit") at a rate which is 25% lower than for German nationals. The explanation given for this disadvantage for refugees is that the financial and social burdens are too great, with the increasing number of asylum seekers and in the context of German unification, so it would no longer be acceptable to give asylum seekers the same conditions as German nationals

receiving social benefits. An additional reason mentioned is that, compared with German nationals, asylum seekers have less requirement for information and communication, and that typically they do not have costs for participation in cultural life (cf. CLASSEN 2000). Since 1 January 2006, single adult asylum seekers receive EUR 224.97 per month. If they are given benefits in kind, they receive only monthly pocket money of EUR 40.90.

As shown in the relevant comments in the interviews, some of the young people see receipt of social benefits as a kind of dependence, as a form of being determined and controlled by others, or as a humiliation. They cannot understand why they should be on benefits although they are young and capable of working to earn their own living. Social benefits also permit only very limited participation in youth-specific leisure activities (going to a cinema, discotheque, pub), so it also severely limits their opportunities for making social contacts. Our impression is that the young people are very much less concerned with the material problems caused by limited financial resources, but rather they experience humiliation from the symbolic factors linked with it.

The questions on *social contacts* produced the most extensive answers, particularly with respect to friends. Only two of the young people said that they had not yet found any friends since their arrival in Hamburg. More than one third of them said they had exclusively African friends, and over a quarter said they had both African and German friends. In the group of those who said they had *only African friends*, one of the reasons mentioned was *language problems*, which made it hard to make contact with Germans – the refugees did not have enough knowledge of German, and the Germans they meet often cannot speak English or French. And even more often, these young people meet with *rejection* from the German population, which they describe as not tolerant, and not open to them. Others report that they have *no opportunities* to make contact with Germans. At school there are only Africans (or foreigners), and it is difficult for them to get into German clubs and associations. The life situations and problems of German youngsters and young refugees are very different, and that means they have very *different expectations* of what friends are for. *Prejudices* are mentioned, acting as barriers to the creation of friendships – some parents of young Germans would object to such friendships, or they would regard young people from Africa as criminal and would therefore avoid them. Some of the young people have *withdrawn* into the African Community and reject contact with Germans.

There is a more positive tone in the comments of those young people who say they have *both African and German friends*. But there are also problems in these clique relationships – friendships break up due to *deportations* or frequent *change of address*, there are *language problems* or *rejection* by German parents. But there is also emphasis of the fact that it is important to make contact with Germans, to learn their language and to adapt to their ways. Some of the young people report that they have a *multi-cultural circle of friends*. Mostly they met their friends in multi-national learning groups at school or in language courses.

One third of respondents report that they regularly participate in the programmes of a sports club, a political group or a religious community. Most mentions were participation in community life of the mosque associations, and two young women reported that they were members of an African Christian church

community. Playing football is important for the young men. Four of them have found clubs in Hamburg, and play football there; five young men report that they looked for clubs, but their search was unsuccessful, so they were now playing in informal groups with other Africans.

Various problems were mentioned making it at least more difficult for young people to join a club or a community group – some of them say they *lack the time* for it, for example they could not go to Friday prayers at the mosque because they had to work during that time; or they could not participate regularly in training at the football club because they had other things they needed to get done. Some say they are *not motivated* for regular participation because of their lack of security in residence status, or because they are so taken up with their own personal problems. Others say they do not have the money for it.

It is clear from what the young African refugees say about their social relations that they are very much subject to *structural segregation* – their contacts with the family and networks of relatives have broken down due to the situation in their country of origin. Their life situation in Hamburg and the associated limitations and problems (language, money, uncertainty, worries) are more of a problem, preventing them from making and cultivating social contacts. In addition, the young Africans are often only together with each other, particularly at schools and in the other educational programmes, due to organisational arrangements (setting up classes for foreigners), or they are with other young migrants; this kind of structural arrangement also reduces their chances of getting to know young Germans. And on the part of German society too, it seems to be very exceptional that efforts are made to establish contact with the young refugees.

What is a refugee?

To be a "refugee" is not a personality characteristic, and it is not the individual decision made in the country of origin to leave that country which makes people refugees (even if asylum law refers to this), but rather legal recognition of status as a refugee – and this is generally effected in the country where they arrive. What is decisive is not the intentional act of fleeing in order to get away from repressive structures, but rather the decisions made in the migration policy of the country where they arrive.

By understanding refugees as a product of institutional action, we are not only referring to their legal status, but also understand the status of refugee as a *moral career*, in keeping with GOFFMAN (1973, 1975). Goffman's argumentation may be summarised briefly as follows: There is no such thing as "normal" relations between normal people and stigmatised people (who include people with physical disabilities, the mentally ill, delinquents, criminals and prostitutes) because no such tolerance and acceptance can be expected on the part of normal people, and cannot be proved. So the stigmatised persons have to learn and apply a whole series of techniques of adaptation and expression of behaviour in order to gain social recognition. One of the central techniques is to accept the attribution of having a damaged identity. So the condition is a public acknowledgement of being damaged, and thus being a victim – a victim of fate in the case of people with disabilities, a victim of circumstances in the case of social deviants, a victim of their own

inadequacies (delinquents) or, as in our context, a victim of state repression in the case of refugees.

As has already been described, legal proof of being a victim is the basis of identity as a refugee – the moral career of the refugee begins with allocation to relevant institutions of the host society. To put it in Goffman's terms, they have to learn and practise techniques of coping with their damaged identity. So the viewpoint would be excessively restricted if we were to see the insecure identities of young Africans in Hamburg merely in the context of the impact of fleeing from their countries of origin. It is rather the case that being in the hands of the social institutions of the host society creates the framework which causes the break, with respect to the dimension of identity. The biographical developments and life histories of the young refugees, their languages and their cultural practices, their knowledge and values, their wishes and needs, are all reduced in the institutional actions of the host society to the status of refugee.

The interview material shows that the young people have learned what they are supposed to learn, and what they have to learn, related to the goals of institutional action – the institutional arrangement of the asylum procedure is very efficient to make it clear to the young people that they are endeavouring to obtain the granting of a legal status which is of existential importance to them and decisive for opportunities or limits of organising their personal life. And the institutional grouping of labour administration, educational institutions and youth service give the impression of being rational and functional, because they are 'arranged' in such a way that the young people are constantly given the message that they are refugees. Schooling, vocational training and work permit are refused to them on the grounds of legal status, or access to these things is made difficult.

The young people have realised this situation, as can be seen from their statements – they understand the social ideas that are associated with refugees by the institutional actions which they are faced with in their everyday lives. They have gone through the fundamental learning experience which Goffman says stigmatised people have to make in a moral career, in terms of their difficult situation and their self-assessment. When they arrived in Hamburg, many of the young people we talked to had only very vague ideas about German society and its general assumptions about refugees, and at first many of them were not able to grasp the consequences for their own lives. But these are precisely the 'hidden agenda' of the host society that they learn particularly fast – unreserved integration of the young refugees into Hamburg urban society is not wanted.

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THE ORIGINS OF RELIGION AS AN HISTORICAL CONUNDRUM: PEDAGOGICAL AND RESEARCH METHODOLOGICAL IMPLICATIONS AND CHALLENGES

Problem Statement

For the last five years we have been involved in a research project entitled *Creating Diagogic Space*. The project aims at determining to which extent conditions such as the presence / absence of social justice, the creation / lack of social and human capital, respect / non-recognition of human rights, the (non-) recognition of individual and group values and so forth, impact on the diagogic space: the space in which people may enjoy the freedom to educate their children, and for their children to be educated in accordance with the educators' preferred spiritual, religious and value system(s). Some of the research went into the notion of the fully educated individual, the organic person, the person of noble character, with integrity, which would be the upshot if the diagogic space were optimally utilised by all educators concerned.

A significant part of the research also revolves around the concepts / constructs of religion and / or spirituality. We initially discovered that all manifestations of religion showed the same basic structure, with spirituality at its epicentre or core, but later concluded that the "numen" (the numinous) seems to lie even deeper than spirituality. These investigations led us to understand that we could not evade the issue of looking at the *origins* of religion. Understanding the roots of religion and spirituality is a precondition for a more accurate grasp of the purpose and function of religion / spirituality in life, and in creating the diagogic space in particular. We engaged in this project with a measure of apprehension because of the nebulousness of the terrain. In this paper, we explore two sets of implications and challenges flowing from our understanding of the roots of religion and spirituality. After giving an account of what we understood to be those origins, we reflect about its pedagogical as well as its research methodological implications and challenges.

Origins of religion and spirituality

Ojowuro (2010: 21-22) concludes that "the list of … theories and opinions [about the origins of religion] are [sic] … numerous…" and that "…no answer could at this age pin down with accuracy, how the first religion had … evolved …, for the … reason that we were not a part of the first generation of humans that started the earliest religion […] the huge gulfs that existed between the first human generation that sets off religion and the generation that developed documentation skill are … too wide apart". According to Ojowuro (2010: 23), the human being's persistence with investigations into the taproot of religion is an indication "that religion had actually evolved with man"; no "normal human being existed on earth who … would not accord the ultimate recognition to the amazing wonders of nature" and as a result, "the human consciousness would … give deserving gratitude to the powers behind these brilliant creations," thus "opening the sequel of man's religious worships to this day". In addition, the abundance of nature may have given cause to

an early belief that "God (was) revealing himself to humankind". Fear (of natural phenomena and disasters) may also have played a role; the earliest human beings "would have devised some ways and means to appease the powers they … envisioned as the controllers of these natural tragedies, [in order] to guarantee the protection of their life from its disastrous rage" (Ojowuro, 2010: 24). This lends credibility to the Roman poet Carus's theory that fear inspired human beings to create gods for their protection.

Ojowuro (2010: 24-25) sought the roots of religion even further back. The very first human beings capable of rational thinking probably reflected about their own existence, and would have probed into the nature of the powers that gave them life. In due course, they would have felt anxiety about the powers that moved the sun through the skies, the return of the sun every morning, the power that created the air that they breathed, made plants germinate, animals give life, thunder to crash, rain to fall, and so on. They would occasionally break out in adulation and mystical incantation to glorify these magnificent powers; they would sacrifice animals to appease the powers and to find continued security of life. In brief, Ojowuro (2010: 27) contends, the earliest human beings would have concluded that "these powers are truthfully higher authorities with more superior powers than they possessed. Consequently, they would have initiated the reverence and worship of these powers, out of … gratitude, respect, fear and the feel of affection for the astounding beauties of the wonderful creations that these higher forces have perfected in the world. […] The gods of thunder, fire, the atmosphere, and all other forces of nature would have subsequently emerged out of his inventions and fancies. … he would afterwards convert all the ethereal elementals of Mother Nature into deities, and religiously adore them as gods and goddesses." In this manner, polytheism became the first religion of the ancient world.

Gradually, as Monaghan and Just (2000: 126) posit, many of the world religions seem to have begun as revitalization movements of some sort, based on the vision of a charismatic prophet firing the imaginations of people seeking a more comprehensive answer to their everyday problems. Charismatic individuals, however, seem to be less the key to the long-term success of religions than the development of a group of supporters able to institutionalize the movement. Institutionalisation may take many forms: spiritual priests claiming superiority for their religion over all others, persecution of and discrimination against those who believe differently, the formulation of doctrine and dogma, the development of theology as a scholarly discipline, religious denominations, and the evolution of religious institutions. Ojowuro (2010: 37-38) decries the fact that these later developments "have been imposed upon the gullible minds of … followers as the word of God … [by means of] story-telling [that] accesses the human psyche not at the intellectual but at the emotional level..."

Three even later developments can be discerned. The first is embodied in the thesis of John Calvin, namely that all people possess the *semen religionis* in their hearts and minds since the moment of their conception and birth (Calvin, III, 1; Duvenage, 1951: 39). All the other trappings of religion grew from this original seed. Secondly, in recent years, greater attention has been bestowed on the spiritual roots of religion and religious experience (Waaijman, 2000: 1-2), to the neglect of all the other aspects of religion (including dogma, doctrine, religious institutions,

theology). At the deepest level, religions have a spiritual dimension: all people share primordial questions at a deep spiritual (emotional) level though the answers they find to these questions, expressed in terms of ritual, can be quite diverse. The spiritual level, as Abdool, Potgieter, Van der Walt and Wolhuter (2007: 547) found, is a "subjective experience that points to an orientation towards (inter alia) an intrinsic religiousness: it is deep and very personal to the individual; it symbolises the individual's quest for values and depth, and describes how he/she relates their beliefs and actions towards god(s) and otherness, to their own being and core values, and then expresses them in religious practices. De Muynck's (2008: 1-2) analysis of spirituality leads him to conclude that spirituality denotes a search in which experiences of inspiration and transcendence, and personal conviction, are connected with concrete every day existence. Spirituality symbolises the human being's quest for meaning, depth and values, and describes how a person relates his or her actions and behaviour towards the Absolute (that is, how a person shows obeisance to and worships that which is regarded as imperishable, unchanging, eternal, indestructible, sacred and meaningful, the ultimate source of all meaning) and towards others, his or her own being, core values and practices. Spirituality can also be seen as the mystical face of religion, as the fountainhead of divinity, the source and essence of the soul (Van der Walt, Potgieter & Wolhuter, 2010: 37).

   The third development is described in the works of MacArthur (1993), Banks (2011) and others. Banks (2011: 17) speaks of the "renewal of an old attack on religion". The "old" attack came from influential thinkers such as Freud, Feuerbach, Marx and Fromm (refer Banks, 2011: 61-130). According to Freud, the invention of religion can be ascribed to the human being's innate fear of nature, relationships and death. People invented religion and the notion of god(s) because of deep-seated fears in a threatening world and of the resultant need of security in a world that they could not control (MacArthur, 1993: 11-12). The "new" attack comes from what Banks (2010: 11) terms the "new Atheism": authors like Daniel Dennett, Richard Dawkins, Sam Harris, Christopher Hitchens and Michael Onfray. While only a small percentage of people seem to believe in no god at all (around 4.4% atheist, and around 16.4% "other non-religious" in a world-wide poll in 1991; refer Blanchard, 2011: 19), the attacks coming from those critical of religion seem to have evoked considerable interest (Banks, 2011: 11). While, for instance, Sam Harris (2010: 148 ff.) does not deny the existence of religion as such (in the form of faith, belief, rites, rituals, prayers, institutions, holidays and so on), he agrees with psychologist Bruce Hood that people's susceptibility to religious ideas can be ascribed to the fact that they tend to develop phobias for "evolutionary relevant threats (like snakes and spiders) and because of the fact that their minds have evolved to detect patterns in the world they tend to detect patterns that are not actually there. Because of a cognitive scheme known as "supersense" they infer "hidden forces in the world, working for good or ill. On this account, supersense generates beliefs in the supernatural … and such beliefs are thereafter modulated, rather than instilled, by culture." The criticism can also take the form of a semantic controversy: was the word "religion" derived from *re + legare* (to read again) or from *re + ligare* (to be tied back again, figuratively speaking to "live in bondage because of one's religious preferences"); the tension between *religiens* ("to be careful") as opposed to *negligens* ("to neglect")?

Pedagogical implications and challenges

Our main concern is with the education of the organic, whole, noble individual, the person with integrity, who will be an asset to his or her community. For this ideal to materialise, the creation of a diagogic space is a *conditio sine qua non*. This is a space where educator and educand can interact freely, willingly and norm-driven for the purpose of leading the latter to higher levels of "educatedness". Our investigations into religion and spirituality so far have revealed that these constructs form inherent "furniture" of the diagogic space, irrespective of how they are defined, or their origins (roots) construed and described. Educators should resultantly reckon with them in creating and using the diagogic space.

Investigations into the origins of religion and spirituality cast more light on the diagogic space itself. In the (post-modern) times in which we live, religion and spirituality take an altogether new form (Parkin, 2011: 154-158): they refer to a "whole supermarket" of religious experiences. Everyone's religious tastes can be satisfied. All these experiences "have a spiritual edge that becomes part of [the educand's] belief system" (Parkin, 2011: 155). This has implications for education. King (2007: *passim*) claims that human religious experience requires intelligence, a capacity for symbolic communication, a sense of social norms, realization of "self" and a concept of continuity. Not only do the spiritual needs and "tastes" of the educator have to be taken into consideration, but also those of the educand. What would it take, in terms of religious and spiritual experiences, for the latter to become a fully educated person, an organic, noble person with integrity? Since spirituality and numinous experiences lie at the heart of being human, all educators are required to focus on these aspects of the education of young people. As for those who are critical of religion, especially in its more organised, institutionalised, formalised and dogmatic manifestations, they should keep in mind, as Parkin (2011: 158) reminds, "it is impossible not to be spiritual", i.e. to put one's faith in some or other deeper source (also refer Van der Velde, 2011: 8). As human beings, all of us are spiritual. Educators critical of organised and mainstream religion should instead resort to their personal value systems, which one way or another, are in themselves rooted in some or other form of spirituality and / or numinousness.

Research methodological implications and challenges

The subject that we addressed in this paper poses a number of challenges to historians, historians of religion and education in particular. It is difficult to reconstrue the origins of religion and spirituality for the simple reason that no written record of those events exist, and because of the vagueness of the oral tradition (refer Armstrong, 2009: 3 ff). We only have a number of reconstructions of the roots of religion and spirituality, and these vary from naïve to critical of religion and spirituality, especially in terms of their modern forms (i.e. organised, institutionalised and dogmatised). It is furthermore difficult to trace the roots of the human being as a religious / spiritual being. Theories and scientific approaches range from conservative creationism through intelligent design to Darwinist views.

The research methodological problems intensify when one engages in a study of religion and spirituality as such. Few other subjects evade examination like these because of their nebulousness and minimal amenability to empirical scrutiny. Also

education, particularly the diagogic space, is difficult to grasp and describe. It furthermore will remain a challenge to be pedagogically prescriptive because of the personal nature of education and of the respective value systems that undergird it. In sum, understanding and describing the complex composed of the constructs religion, spirituality, the numinous, the organic (whole, noble person with integrity) and the form of education required to deliver an organic person to society, is a daunting task for historians of education. We have so far taken only a small step on this journey.

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A BRIEF OVERVIEW OF THE HISTORY OF EDUCATION IN POLAND

Abstract

Poland's complex history strongly influenced the development of educational system. Together with the Catholic church, formal and informal education helped to preserve national identity and prepare society for future independence during the partition period. In the communist era, education was the chief mode of restructuring the society and improving the social mobility of the hitherto unprivileged workers. The postcommunist era brought an extensive debate over the goals of restructuring the socio-political system.

The goal of this paper is to share with the readers some ideas about the past and the present of the Polish educational system in order to point out that the reform of it is still a continuous process aiming to find out the optimal way for individuals' holistic development. The authors, who are mental health care providers, put also to the spotlight some examples of mental health education in Poland.

Introduction

The Republic of Poland is a country located in Central Europe. With about 38 million inhabitants this is the sixth largest population in the European Union [Eurostat, 2011]. The origins of the country date back to the 10th century, when the kingdom of Poland was founded. The crowning achievement of the development of the state and its territorial expansion was establishment of Polish – Lithuanian Commonwealth in 1569. In the mid-17th century the decline of the monarchy began and in 1795 Polish lands were annexed by the Kingdom of Prussia, Russian Empire and Austro-Hungarian Empire. The independence was regained in 1918 and lost again in 1939 due to invasion of Nazi Germany and the Soviet Union. After the end of the 2nd World War Poland remained a Soviet satellite state until the collapse of the communist system in 1989 when the process of transition towards parliamentary democracy started. The country complex history strongly influenced the development of educational system. It can be easily observed that turning points in Poland's history, such as partition of the country or beginning of Soviet's supremacy, had major effects on the priorities and organization of education. Thus, the development of national education system can be divided into several periods.

From the establishment of the Kingdom till the educational reform in the 18th century

First single schools run by the Roman Catholic Church and educating the clergy emerged in the 11th century. It was in the 13th century that importance of education started to increase. Poles were studying at the universities abroad and in the country education on lower levels was still developing. The curriculum was divided into two parts: *trivium*, comprising grammar, logic and rhetoric, and *quadrivium* including arithmetic, geometry, music and astronomy. The network of provincial schools was created but they were generally restricted to nobles, knights and merchants. The development of education was crowned in 1364 with the establishment of

Jagiellonian University, the first university in Poland and the second in Central Europe. It soon became the main centre of education for intellectual elite and a place of academic tolerance. At the beginning the profile of the university indicated that one of its aims was to educate the qualified clerks. At the end of the 15th century the number of provincial schools nearly tripled. Although they were still run by the clergy, the curriculum also included knowledge indispensable for civil life. In the 16th and 17th century textbooks emerged and developed as instruments of teaching. The coverage of the textbooks content was focused mainly on practical skills, such as accounting. Unfortunately, Counter Reformation partially inhibited development of education in Poland. The nobility gained monopoly in public and political life which resulted in decrease in education importance [Samsonowicz, 1990]. However, a number of Polish scholars were aware of the poor condition of education and initiated progressive tendencies to modernize the curriculum and to expand educational opportunities over non-privileged classes. The reform started with the establishment of National Education Comission (KEN) in 1773, financed with the funds confiscated from the abolished Jesuit Order. KEN's main achievements include creation of educational structure, unification and rationalization of the national curriculum in accordance with Enlightment thought. In schools Latin was replaced by Polish language and equal right for education for girls and boys was introduced [Davies, 1996].

Partition period (1795 – 1918)

Through the eighteenth century, Poland was a refuge for academic figures persecuted elsewhere in Europe for unorthodox ideas. The dissident schools founded by these refugees became centers of avant-garde thought, especially in the natural sciences.

Unfortunately at the end of the eighteenth century partition challenged the work of the Commission on National Education because Germany, Austria, and Russia sought to destroy Polish national consciousness by germanizing and russifying the education system. Educational opportunities for Polish children differed depending on the area of partition. In general, the Austrian sector had the least developed education system, whereas the least disruption in educational progress occurred in the Prussian sector. Prussian authorities were also more tolerant of Polish culture manifestation. The important underground initiative undertaken by the Poles in order to protect their culture was Flying University established in Warsaw. Lectures were organized in different places to avoid deconspiration. One of the notable graduates of the University was Maria Curie-Skłodowska [Davies, 1996]. In Austrian partition heterogeneity of the population impeded introduction of one language to the schools and allowed to save some autonomy.

In a consequence of the partitions Polish population was dispersed among three nations for over 100 years. During that time education played an extremely crucial role in maintaining national identity and culture of the Poles. This aim was achieved not only through formal education but more importantly, through self-education. It is estimated that as much as 30% of Polish people in the Russian partition was gaining knowledge and skills independently of the educational system [Davies, 1996].

The interwar period (1918 – 1939)

Obviously the main concern of the education authorities in this period was the task of reconstructing a national education system from the three separate systems imposed during partition. The first attempt to achieve this goal was the Teachers' Parliament which gathered in 1919. It recommended a number of reforms, e.g. seven year universal primary school and linking of the primary schools with the secondary education. In the end the Ministry rejected majority of the recommendations but the Parliament's vision of universal educational opportunities for all classes had important symbolic meaning for future educational system development. In 1932 the school reform introduced seven year universal primary school which was supposed to increase chances of obtaining secondary education. However, in rural areas majority of children ended their education at 4th class, often due to the lack of possibilities to achieve even mandatory level of education. Thus, inequalities in educational opportunities experienced by different social classes continued [Krasuski, 1985].

Although national secondary education was established in the 1920s, the economic crisis of the 1930s drastically decreased school attendance.

Among the educational accomplishments of the interwar period were establishment of state universities in Warsaw, Wilno (Vilnius), and Poznan (available only to the upper classes), numerous specialized secondary schools, and the Polish Academy of Learning.

The World War II (1939 – 1945)

Between 1939 and 1944, the German occupation sought to annihilate the national Polish culture once again. All the secondary and higher schools were closed to Poles and elementary school curricula were stripped of all national content. In response, an extensive underground teaching movement developed under the leadership of the Polish Teachers' Association and the Committee for Public Education. As early as in 1939, the Secret Teaching Organization (TON) was established in order to arrange the underground teaching, which included all levels of education, up to the university level [Bukowska, on line]. The teaching movement was crucial for the maintenance of the Polish culture and national identity, as well as for the preparation of the base to rebuild the educational system after the end of the war.

Post war period (1945 – 1989)

In 1945, the number of Poles unable to read and write had been estimated at 3 million. In the early 50s, all levels of Polish education were plagued by shortages of buildings and teachers. The Polish educational system during the era of Soviet supremacy had four distinguishing characteristics. Firstly, education was strongly ideologized and politicized. The school was perceived as a main tool of creation of the new human being – *homo sovieticus*.

Secondly, the aim of the educational system was to create and maintain the desired social structure with the specified proportions of different social classes. In harmony with the principles of Marxism-Leninism, the working class was supposed to be the base of the structure. A wider availability of education was to democratize

the higher professional and technical positions previously dominated by gentry or upper middle class. Because industrialization goals also required additional workers with at least minimum skills, the vocational school system was substantially expanded.

Thirdly, the educational system was strongly centralized. The curriculum, as well as the content of the textbooks, were unified across the country.

Finally, due to the authority negative attitude toward private ownerships and the resentment toward religious schools, the private sector was barely present in the educational system. Additionally, the authorities were determined to control the ideological transmission in educational process [Dolata, 2005]. The education reform was an important demand of the widespread Polish demonstrations against Stalinism in 1956. Under the new socialist first secretary, Władyslaw Gomułka, the government education policy rejected the dogmatic programs of Stalinism and in their place began the first period of the postwar education reform. Religion as an education subject was restored, at the option of parents. In the vocational program, agricultural training schools were added, and technical courses were restructured to afford greater contact with actual industrial operations.

The modern era (1989 – today)

After the emergence of the Solidarity movement in 80s, the student and teacher organizations demanded a complete restructuring of the centralized system and autonomy for local educational jurisdictions and institutions. The political transformation, which followed the collapse of the communist system, was accompanied by the changes in the educational system. The major processes included creation of the pluralistic market of the curriculum and textbooks, which was not influenced by the communist ideology. Moreover, the educational system was decentralized and as a result schools gained more autonomy and became more involved with the local environment. Another major process, regarding the secondary education structure, consisted in decrease in number of pupils obtaining only vocational education and increase in number of graduates with secondary and higher education. Modernization of the educational system was achieved with the change in educational structure (introduction of the *gymnasium*) and the curriculum reform [Dolata, 2005]. Currently, Poland is participating in international educational assessment programs, such as PIRLS programme [Konarzewski, 2007] or PISA survey [OECD PISA, 2009].

New trends are also being observed in lifelong learning options. Rapid development of technology and changing working patterns, forced the adult population to constantly raise their educational achievement [Błędowski, 2010]. In 2010, 5,3% of adult population of Poland participated in education or training, compared to 4,3% in 2001 [Eurostat, 2010].

As one of the EU Member States, Poland participates in the implementation of the Community Lifelong Learning Program (LLP) established on the basis of Decision Nr 1720/2006/EC of the European Parliament and Council dated 15th November 2006. The structure of LLP comprises the following sector programmes: Comenius – school education, Erasmus – higher education, Grundvig – adult education, Leonardo da Vinci – vocational education and training and Study Visits.

Another worth mentioning initiative regarding the field of education is the University of the Third Age, whose aims are the education and stimulation of retired members of the community – those in the "third age" of life. Some study groups do not have a prepared syllabus, but draw on reports of current affairs in their topic subject to prompt conversation and research. Some groups are designed to cross disciplinary boundaries: combining society, technology and science. Some groups aim to bridge the generation gap in the field of information technology, opening up an exciting new world to many who might have been oblivious of it otherwise. There are also many less educational activities including bridge tuition, countryside walks, dance in all its forms etc.

A new initiative, dated in year 2010, is the University of the Second Age for persons 45+, whose aims are to fill the gap between the First and the Third Age education in the lifelong learning system and combat the social exclusion of marginalized groups.

Mental health professionals' training

The authors, who are mental health care providers, put also to the spotlight some examples of mental health education in Poland. Mental health has become the subject of university education across many fields: medicine, nursing, social work, psychology, sociology, pedagogy and law. In this paper we present some examples of training in psychiatry, psychiatric nursing and social work.

Psychiatry

Psychiatry was introduced as a separate subject at medical faculties in the middle of 19th century. In 1951, all Polish university medical faculties were transformed into independent organizations – Academies of Medicine. In the late 2000s, the former name was changed into Medical University. Medical schools have status of State Higher Education Institutions and are financed by the state.

The undergraduate course in clinical psychiatry provided during the last year of curriculum is focused on knowledge of mental disorders – etiology, pathogenesis, psychopathology, classification, treatment, rehabilitation and social psychiatry; skills in psychiatric examination and mental status assessment; skills in providing a holistic approach to the treatment of mentally ill persons [Bilikiewicz & Bomba, 2002].

The postgraduate training in clinical psychiatry lasts five years. The candidates apply for residency in training centers nominated by the Minister of Health upon the recommendation of Accreditation Committees. The training programme is focused on knowledge and experience needed to independently solve clinical problems, developing mental health promotion, gaining skills for working in multidisciplinary team within different organizations. Resident has his/her individual tutor and individual supervisors when practicing in different mental health services [Bilikiewicz & Bomba, 2002]. Training is concluded by passing National Examination which has few phases.

Nurse education

In the 1980s and 1990s, the nurse education was provided in medically based high schools in five year programme or in post-high professional medical schools

over two years. The education was focused mainly on instrumental tasks. In December 1995, the Polish government signed the European Agreement on Nurse Education and Training. The first transformation extended the educational curriculum to two and a half years with the subject related to health promotion, prevention, health education and diagnosis. The second modernization extended the educational curriculum to three years with at least 4600 hours of training. The college-level nursing studies include a set of general, basic and professional subjects concluded by a practical exam and graduate thesis [Lipińska & Osicka, 2002]. Masters degree requires subsequent two years studies with at least 1300 hours of training and ECTS points not less than 120.

Specialist two and a half year neuro-psychiatric nursing programme is focused on general rules and detailed description of work, psychiatric nursing in a hospital as well as in the community settings with acute and long-term disorders, specific topics related to treatment, psychological and social factors affecting mental health, neurological nursing, ethics and legal issues.

Social work

Since last decades, the world dynamic industrial development improved people's quality of life, but also created negative phenomena like alienation, marginalization, social exclusion and equality. The Maria Grzegorzewska Academy of Special Education (ASE), established in 1922 in Warsaw, is the first higher education institution in Poland to have started a full-time social work study program (previously, social work faculty was incorporated into other social science courses). The programme is designed to meet the needs of the disadvantaged people who need professional care and support. Its base constitutes of theories about the causes, challenges and cycles of clients' difficult circumstances, theories and methods relating to social work practice enriched by specialist knowledge of social policies and general knowledge of psychology, sociology and pedagogy as well as involvement in field work.

Students of social work develop their practical skills in managing non-governmental organizations and gain the knowledge of raising funds from external sources, including EU funds.

Conclusion

The authors present a brief overview of the history of education in Poland in order to point out that the reform of it is still a continuous process aiming to find out the optimal way for individuals' holistic development. As a mental health care providers give a few examples of mental health professionals' training to show that in this field the reform is also ongoing process.

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"EVERYBODY IS GIVEN A CHANCE, MY BOY … EVERYBODY WHO IS WILLING TO WORK FOR SOCIALISM": AN OVERVIEW OF ENGLISH TEXTBOOKS IN THE POSTWAR PERIOD IN HUNGARY

Abstract

The main aim of this paper is to provide an insight into English textbooks published in Hungary after 1945, when the newly formed political commission (Communists) took control over education. The intention is to show how the ideology and political climate of the age was reflected on their pages, i. e. how English textbooks were used for the purpose of the Communists' objectives and interests. For the purpose of this paper, there have been selected three textbooks, considered as the most representative. The first textbook is dated from 1953. This is the period of the greatest dictatorship under the regime of Rákosi, the period well-known as the period of the *Red Terror*. The second and the third textbook represent the period after the Hungarian revolution in 1956. The former one was published in 1957 and the latter one in 1961. All three textbooks were intended primarily for the secondary school children (gymnasium) but were not used only to teach English language. The research has shown that all textbooks were imbued with the ideological ideas, strongly promoting the Soviet Union, socialism, community work and perfect Communist society. The author concludes that these kinds of sources can be very useful in recovering this turbulent period of Hungarian history.

Keywords: Hungary, English language, textbooks, Communism

Introduction

The main aim of this paper is to provide an insight into English textbooks published in Hungary after 1945, when the newly formed political commission (Communists) took control over education. The intention is to show how the ideology and political climate of the age was reflected on their pages, i. e. how English textbooks were used for the purpose of the Communists' objectives and interests. For the purpose of this paper, there have been selected three textbooks, considered as the most representative. The first textbook is dated from 1953. This is the period of the greatest dictatorship under the regime of Rákosi, the period well-known as the period of the *Red Terror*.[1] The second and the third textbook represent the period after the Hungarian revolution in 1956. The former one was published in 1957 and the latter one in 1961. All three textbooks were intended primarily for the secondary school children (gymnasium) and were published by the National Publishing Company situated in Budapest. It was the only centralized publisher.

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[1] Matyás Rákosi (1892 – 1971) participated in the communist government of Béla Kun, the leader of the 1919 Hungarian Soviet Republic. After the WW2 he was posted as a Soviet puppet and held a position of General Secretary of the Hungarian Communist Party and was in office from 1945 till 1956. Inspired by Stalin's regime and his political purges, Rákosi imposed totalitarian rule on Hungary.

One of the main characteristics of the period under research was the fact that, by taking control over the education, the Communist regime decided about teachers' political suitability (they had to attend political seminars to be educated in the Marxist-Leninist spirit). At the time lots of them were away for various reasons: death, military imprisonment, emigration (Mészáros et al., 2000, p. 403). Because of this, many schools did not have any foreign language classes at all (Romsics, 2005, pp. 325-327). The regime also introduced censorship of curriculum and all other printed matter (the so-called politically incorrect texts were replaced, and new texts were inserted). Until 1949 when the new curriculum, which favoured the Russian language, was introduced, there was obvious orientation toward German language. More than 80 % of primary school children learned German language.[2] Followed Latin and English represented with 8 % and 6.5 %. The Russian language, which was until 1949 facultative, was represented with only 1 % (Faludi (ed.), 1960, p. 306.). The introduction of the new curriculum caused a radical decrease in number of hours of English and other languages (they were considered as an imperialist/bourgeois), while Russian became obligatory. Since then, the textbook publishing was under the monopoly of the Communist regime. The Ministry of Education did not have any formal power. It was only the *transmission belt* for processing the will of the Communist Party (Mészáros, 2000, p. 409).[3] Under all these circumstances, we can only imagine the working conditions of English language teachers. They had to adapt to the new political circumstances. They were forced to learn Russian language in a very short term; otherwise, they would loose their jobs. They also had to adapt to the English textbooks from which they taught. In all of them we can notice several typical topics.

Stories inspired by the Soviet leader Stalin

Most of the textbooks contained numerous stories about the Soviet leader Stalin. For instance, in the textbook published in 1953, we find the story entitled *Comrade Stalin's Childhood and Youth*. The text was written in occasion of Stalin's 70th birthday, celebrated "not only by the Soviet people, but also by the whole progressive world". "His name is the symbol of friendship among nations, the symbol of freedom, peace and Socialism." Pupils were furthermore taught that "for us Hungarians Stalin means our very life, our liberation and happy future. He is the great friend of Hungarian people". Follow the details from his biography, the most

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[2] The Communists explained the reason for such a great popularity of German language: „As for the reactionist and counter-revolutionary class aspirations, their adequate path was the propagation of the fascist political systems." (Faludi (ed.), 1960, pp. 295-296.)

[3] The official contemporary documents stated that each kindergarten, school, college or university has to become the construction sight of the newly-built socialist society, and teachers, as socialist workers, must break up with the harmful past, and start with building of the socialist future. According to the resolution of the Hungarian Central Committee dated from March 29th 1950. "our schools are not in relation to real life and production […] People's Democracy is heavily burdened with bourgeois ideology and clerical reactionary influence […] Causes for these are the undermining and saboteur work from the part of the enemies [...] the enemy has focused its energy to the cultural front, especially on the educational field; therefore, the main task is firstly to expose and make them inoffensive, and later, to correct the mistakes." (Mészáros et al., 2000, pp. 410-411)

important one the fact that Stalin was "still a boy of fifteen when he became acquainted with Marxists and began to read Marxists literature". The story ends with Rákosi's words that Stalin is "Lenin of our days", "the example of every Communist, Socialist and honest democrat" (Zentai & Korenchy, 1953, p. 80). Obviously, English textbooks served not only to teach language but also to teach great political lessons.

Stories inspired by Lenin and other great revolutionaries of the age

This story about the Stalin and the Soviet Union is not the isolated case. We also find the stories about the Great October Socialist Revolution, the story *On the way to Communism*, the story *Comrade Rákosi meets Lenin*, and the story *For the Freedom of Our People* (Zentai & Korenchy, 1953). All of them have similar political vocabulary. For instance, the latter had the task to teach pupils about great deeds of Comrade Rákosi[4] who was very appreciated by Lenin:

> Lenin confirmed the criticism and self-criticism with a nod of his head. Then he said: "We shall not forget the lessons of the Hungarian Soviet Republic. We shall learn from the mistakes. We shall not repeat them. Hungary is too small to face its enemies alone. But the Hungarian people fighting for freedom will be victorious. Comrade Rákosi, you will see the victory of the Hungarian revolution." Krupskaya, Lenin`s wife, spoke of this conversation in 1925 when Comrade Rákosi faced the court of the Horthy fascists. At the meeting organized to save the life of Rákosi, she said: "Lenin was very fond of Rákosi. He appreciated him very much. Vladimir Ilyich knew men well. At their first meeting, Lenin`s opinion was that it is comrades such as Rákosi who bring the cause of the people to victory all over the world." (Zentai & Korenchy, 1953, pp. 31-32.)

It is important to mention that all these stories were always followed by the detailed questions which examined whether pupils correctly and fully understood them and, of course, whether they understood the messages they conveyed:

> 1. What happened in 1919 in Hungary? 2. Why had Comrade Rákosi to leave the country? [...] 5. What was Lenin's reply to Comrade Rákosi`s request for help to release the Hungarian Communists from prison? [...] 9. Has Lenin's prophecy concerning Hungary become true since? [...] 11. What was the opinion of Lenin about such types of man as Rákosi? (Zentai & Korenchy, 1953, p. 32.)

The same pattern of text and questions we can find in many other texts, such as the text *Reminiscences of Marx*, published in the textbook dated from 1961 (Báti & Véges, 1961, pp. 77-83).

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[4] Rákosi was imprisoned in 1925 by Horthy`s regime. He was released as a part of a deal with contemporary Hungarian government. During his stay in the Soviet Union he was thoroughly prepared for the Communist takeover in Hungary in 1945.

Working class as the boss of its faith

Furthermore, all the textbooks are imbued with teaching that working class should be the boss of its faith. For instance, in the textbook published in 1957 there can be found the text *The country is ours*. John Szabo, the key figure, is a Stakhanovite whose "average production record is 300 per cent." The text describes him as a determined figure who knows what is at stake – the first Five Year Plan and the survival of the People's Democracy. "He knows where the product of his work goes." Also, the clear vision of the bright future is depicted here: "If one speaks to him, he always says: our plant, our ministry, our Five Year Plan" [...] Such are Stakhanovites. […] "When you speak to them, you get a clear picture of the opportunities what all young people have in a socialist society. They have the work and do it well, because they know that our People's Democracy has made the workers masters of the country. There is no boss who exploits them, at his plant the worker is now the boss." As many other texts, this one ends with a set of questions, such as: "Why do people work more willingly in Socialism than in Capitalism?" or "What did they learn from their Soviet comrades?" (Báti & Véges, 1957, pp. 86-87). The intention is obvious. Such stories about endless opportunities for workers are typical for all analysed textbooks.

The importance of social work: good and bad examples

Furthermore, the textbooks taught of the great importance of the community work, which was one of the most important features of socialism. The spirit of community can be seen even in the covers of the textbooks. All of them had on their back cover the following instructions, which witness the attitude toward the common property:

> You should know that this book is also the weapon of science. Respect it, keep it clean, as soldier does with his weapon. You should also recognize that 25 people worked on this book, either at desk or with printing machines. Respect their work […] do not write into this book. […] At the end of the year, pass it on to other student. A good book is a weapon in your quest for knowledge!!! (Báti & Véges, 1957)

Thus, everything belongs to everyone – school textbooks, even factories. We can often find explanations that all, including factories and factory libraries, belong to "all of us", that is, it is in the collective ownership. The text is written in a very idealistic tone. Women are diligently working, their children are playing around the factory, and the factory library is big and available to everyone… (Zentai & Korenchy, 1953, p. 44).

Hungarian children were taught that their role in building up the country in socialist spirit is very important. As a good example serves us the story of the Pioneer Railway, where it is clearly stated that "all the boys and girls were perfectly aware of their part in the building up of their country". Moreover, one of the girls says that we have accomplished three year plan and we are starting another one (Zentai & Korenchy, 1953, p. 67). The fact that she uses the personal pronoun "we", confirms the mentioned thesis.

Negative examples also served the same purpose: to educate children about the importance of social work. There is one story which takes place in a British youth camp. George, a British boy, who was one of the participants, was lazy, unwilling to work as others did, only waiting for lunchtime. Everybody laughed at him. Péter, his Hungarian colleague, warned him that everybody works except him, which "is not nice and it is not social …" (Zentai & Korenchy, 1953, p. 62). Of course, here Hungarian boy serves as an example of good behavior and honesty. In many lessons we find that the British do not have developed idea of importance of the community work unlike the Hungarians.

Capitalism as the greatest of all evils

However, while socialism and socialist ideal were greatly promoted, capitalism seemed to be the greatest evil. This witnesses the lesson *Little slaves of capitalism*, which deals with the Industrial Revolution of the second half of the 18th century. Although industry grew at the time, it produced a great many evils. One of the most important is the employment of children. However, such evils, story says, are even characteristic of many contemporary capitalist countries:

> While we build nurseries and schools, the Pioneer Railway and theaters for our youth to make their life carefree, happy and gay, in the capitalist country children have already to bear burdens and miseries indivisible from Capitalism. (Báti & Véges, 1957, p. 57)

Capitalism is always depicted as the negative system. For instance, the main characters of the textbook printed in 1953 are the Davises, the British family. We have already mentioned George, their son, who was trying to avoid helping his colleagues in the British camp. His mother was described as an unemployed woman from the working class. His father works in factory for a very low wage. Practically, they are very poor. While speaking with her Hungarian guests, the British lady is astonished by the fact that in Hungary ration cards are not used any more and that they have plenty of food at their disposal (Zentai & Korenchy, 1953, p. 26). In addition, there is another scene. While visiting Hungary and Hungarian factories, the British boy learned the lesson: unlike in Britain, in Hungary, a good worker may achieve anything, even good education, supported by the Government of the People's Democracy. "Everybody is given a chance, my boy … indeed everybody who is willing to work for socialism," told him his Hungarian host. Thus, while life in Britain, as a capitalist country, was depicted as far from perfect, life in socialist Hungary was described almost ideal. The purpose of that was to convince young Hungarians that their country stands certainly on the right path (Zentai & Korenchy, 1953, pp. 68-69).

Conclusion

The analysis of selected English textbooks published in the period covered by this paper showed that textbooks are indeed very valuable historical sources. We can state that the Communist regime put a lot of effort in suppressing reactionists and counter-revolutionary propaganda on all levels. The English language, considered bourgeois and regressive, was one of the main targets. All analyzed textbooks

showed the same pattern of teaching the English language through the ideas of promoting Soviet Union, socialism, community work and perfect Communist society. Moreover, this was even clearly stated in their forewords: "Our goal is, also, that words from certain texts should be repeated as much as possible in order to achieve productive learning, also certain philosophical and political messages should not be left untapped." (Báti & Véges, 1957, p. 3) On the other hand, there is a strong criticism of Western societies which were depicted as evil and not suitable for good and happy life promised in Hungary as the socialist country.

Certainly, further researches, which would include the English textbooks published in Hungary in the later period, would certainly shed an additional light on the political circumstances and the influence which the Communists had over the education system. Of equal importance would be to explore the attitude of the English teachers and learners toward the political climate reflected in textbooks and the way English language was taught at the time. This would certainly show to what extent the Communist regime was successful in their attempts to shape the minds of their citizens according to their beliefs and their ideology.

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SITUATED LITERACY PRACTICES AMONGST ARTISANS IN THE SOUTH WEST OF NIGERIA: DEVELOPMENTAL AND PEDAGOGICAL IMPLICATIONS

Abstract

This paper reports an aspect of a larger study on literacy practices, needs and perceptions of artisans in a part of the South West region of Nigeria. Using an ethnographic approach to research, it identified a variety of literacy practices, events and mediums, thus confirming the notion of literacy as social practice. The study employed a modified form of ethnographic research which was specifically designed for this study, a density of literacy practices approach to ethnographic research, data was collected through a mixture of observation, participation and a series of interviews and dialogues. The data were subjected to qualitative and quantitative analysis which enabled a range of themes and distributional patterns to emerge. It concludes by highlighting implications for governance and pedagogy.

Introduction

While it is true that the notion of a dominant discourse has in a way dominated discussions on perceptions of literacy (Ade-Ojo, 2011), it is also now evident that the acknowledgement and introduction of other discourses are now being firmly entrenched within the discourse of literacy. This emergent acknowledgement, mostly anchored to the seminal work of Street (1984, 1995) and which acknowledges an autonomous as against an ideological model of literacy has now yielded numerous terminologies including; multiple, social, situated and local literacies (Street, 1995; Barton, Hamilton and Ivanic, 2000). The central thrust of these studies has been that literacy should be seen as a social practice which draws from more than just the cognitive essence of its users (Satchwell and Ivanic, 2007). Developing from this perception is the notion that literacy is employed for purposes other than learning. This view is encapsulated in the submission of Satchwell and Ivanic (2007, p. 305) that, 'It is crucial not to conflate 'literacy' with 'learning', since each can exist without the other. Literacy, therefore, should not be restricted to an interpretation that sees it as merely a set of skills typically employed for interpreting linguistic structures, but as something that possesses a range of varieties which should be situated in different social contexts'.

While many studies anchor their exploration of literacy practices on the dictates of a social perception of literacy, it is paradoxical that many of these studies end up by looking at literacy mostly in the context of education. This, in our view, reinforces the notion of the inexorable link between literacy and schooling. Illustrating this paradoxical alliance are the works of Satchwell and Ivanic (2007) and the study by Ngwaru and Opokwu-Amankwa (2010). The latter in particular, while lamenting the one-sided nature of existing literature on literacy practices in terms of regional distribution, paradoxically limits its own scope by looking at these practices mainly in the context of education and learning. In response to the predominance of studies such as this, the present study aims to explore literacy

practices in contexts other than those related to schooling by focusing on subjects who are not engaged in learning and, therefore, reinforce the notion of literacy as social practice.

The second rationale for this study is closely aligned to the notion of generating a universal dimension for postulations that are made on literacy. In setting the scene for their study, Ngwaru and Amankwa (2010, p. 295) identify as one of their goals, the need to 'broaden the debate' by including 'a picture of the challenges faced by sub-Saharan Africa'. It is in line with the acknowledgement of the need to provide universal validity to claims that are made on literacy that this study focuses on an area in Sub-Saharan Africa with the hope of providing the avenue for comparison and for drawing a more universal conclusion on literacy practices.

Perceptions of literacy

There is an established dichotomy between various perceptions of literacy in the literature. The more commonly used terminology to represent the two dominant conflicting perceptions are the ideological and the autonomous perceptions of literacy (Street, 1984; Barton and Hamilton, 1998; Barton, 2006; Ade-Ojo, 2011). While the latter perceives literacy as essentially located in the cognitive realm which is often mediated through the ability to read and write, the former is perceived as having a social essence which is more focused on the specific context in which written language is used to get something done (Stachwell and Ivanic, 2007).

This research is anchored to an orientation of the ideological perception of literacy which has been particularly espoused in the works of the New Literacy Studies (NLS) (Barton and Hamilton, 1998; Street, 1984 and 1995; Barton et al., 2000; Satchwell and Ivanic, 2007; Gebru et al., 2009). The allegiance to the ideological perception of literacy in this research is informed by two factors. First, because the study is essentially an ethnographic study, this perception provides the opportunity for ethnographic researchers to better understand what they observe as a range of literacy events. This offers a unit of analysis of events which the cognitively defined alternative perception would not have admitted and, therefore, facilitated a better understanding of the 'culturally specific characteristics' (Satchwell and Ivanic, 2007, p. 304) of the events they observe. The second implication relates to the goal of the research itself. This report is an aspect a larger research which sought to explore literacy in the context of the overall social existence of a group of people. This is distinctly different from an exploration of literacy in the context of learning. In order to acknowledge the different ways, other than in the learning context, in which literacy is employed, it becomes inevitable that a perception of literacy that acknowledges its social practice essence is subscribed to.

Methods of data collection

This research employed a number of methods for the collection of data. Central to this is a modified form of ethnographic approach which focused on the density of literacy practices in the South West region of Nigeria and amongst the subjects under investigation. This approach starts by identifying the critical periods in which literacy events occur and focuses the ethnographic representation and participation

of the researchers on this period. The approach was recommended by the goal of the research and by the legacy of the success that mainstream ethnographic approach has achieved in literacy research in different settings (See e.g. Satchwell and Ivanic, 2007 and Gebru et al., 2009). As argued in the preceding section, this research takes its orienting theory from the ideological perception of literacy and, therefore, sees the major units of analysis as literacy events which are mediated in a number of ways. In order to collate an accurate account of the various events which represent different literacy practices, it was important for the researchers to 'get to the heart of people's understandings of their own literacy practices and literacy events rather than supposedly objective study on them' (Thomas, 2009). Hence, the use of an ethnographic field work approach which required researchers to continuously interact with subjects for a period of six months. The data recorded through researchers' fieldwork was further supplemented through the use of a questionnaire and interview. The overall effect was that the combination of the three methods promoted data triangulation – which also helps in triangulating the results.

Data Analysis

The goal of this section of the study was to identify distribution of practices and the frequency of their occurrence. To achieve this, data collected through researcher fieldwork and questionnaire were codified numerically and subjected to statistical analysis to map out frequency of distribution. Further data collected through interview were subjected to content analysis (Thomas, 2009) which was used to classify the semantic import of the subjects' views on their own practices and literacy events. Responses to interview questions were codified on the basis of the semantic notions they signified and these were subsequently used to discuss the pattern emerging from the quantitative data collected.

Selection of research sample

The sample of subjects for this study is a convenient sample (see Kerr, 2009). The element of convenience arises from the willingness to participate and from the location of the subjects in terms of residence. The choice of participants in this respect was dictated by the consideration of whether they reside within the geographical area the research was focused on. Given the ethnographic nature of the data collection method, it was important that only potential subjects who reside within a particular radius were considered as subjects. Of these, all willing participants were recruited as subjects of the study. To avoid selection bias which is sometimes seen as a weakness of convenience samples (Thomas, 2009), the researchers ensured that all known artisan vocations were objectively represented while gender was equitably distributed among the subjects.

Research findings and discussions

Respondents' gender

The subjects were split equally in terms of gender with each gender accounting for 50% of the subject group. This split, while incidental, allowed us to use gender distribution to address on of the potential problems of using a convenient sample

group; representation. The expectation was that with the equal representation of gender among the subjects, findings that might be gender-significant will have more authenticity.

Literacy practices

Identified literacy practices were spread across four distinct areas. The first, social represented the use of literacy in a range of social interactions which were neither formal nor predictable with only 2.7% of subjects recognising this as a part of their literacy practices. Researchers observed that many of the events representing this practice were not mediated through any formal written text. Rather, they found a myriad of ways in which these events were mediated including pictures, songs and electronic devices like the telephone and the television. For example, a researcher observed how invitation to a social event was mediated through a song. This reinforces the argument that literacy is best seen as a social practice which is and can be mediated through several mediums (Street, 1984, 1995; Barton, 1994; Barton et al., 2000; Satchwell and Ivanic, 2007) and not only through the written text as argued by Olson (1997).

The second identified practice is academic. In this context, researchers observed that 2.7% of the subjects employed their literacy in furtherance of academic or learning pursuit. One subject who was observed engaging with written text regularly explained that it was towards learning specific requirements towards becoming ordained as a pastor in his local church. Another engaged with literacy texts because he wanted to become recognised as a seamstress for a big fashion chain, which required that she demonstrated her ability to write down information for and from customers.

By far the most highly represented is literacy practice in professional context. This was observed amongst 83.8% of subjects and reiterated during interviews. The various events include using text messaging for advertisement, using diagram to inform clients and to display their products, using labelled sample products to advertise, writing out receipts, using empty product containers to place orders for replacement, using sample materials to signify availability of products. Many of the subjects indicated that written texts would not have adequately replaced their chosen. First, written text in their situation would not have attracted their clientele and second, many of their clientele would not have been able to engage with written texts.

The final literacy practice category, 'all aspects of my life' has been created to cater for findings based on interview sessions. When questioned about other aspects of their lives in which literacy is practiced, 10.8% of the subjects stated that they employ one form of literacy or the other in all aspects of their lives. These aspects include religion, social, academic, professional and political practices. This again confirms that literacy is situated in different social practices and that individuals may use different Literacies in different aspects of their day to day existence (Barton et al., 2000).

Gender Vocational distribution

After subjecting the data to interrogation through the ANOVAs and co-efficiency instruments of SPSS, the distribution of professional vocations was found

to be gender sensitive. This research took a conscious decision to investigate the extent to which gender is significant in the distribution of literacy practices because there is some evidence that a significant percentage of literacy practice is employed in the context of professional engagements. As studies have established that professional engagement in Nigeria is gender sensitive, it was felt that any gender sensitive findings needed to be flagged up, as this study is expected to have pedagogical as well as developmental implications. Both the ANOVA and Coefficient tests confirm that the correlation between gender and literacy practices is significant at the 0.01 level 2-tailed.

Conclusions

Studies in Europe have long confirmed that there are multiple and situated Literacy practices particularly amongst learners in further education colleges in England. This study has taken this a step further by confirming that there is some evidence that the notion of multiple and situated literacies might well be universal and that it is not limited to learners but extends to other groups such as artisans. This has both pedagogical and developmental significance.

From the pedagogical viewpoint, this challenges us to start thinking of the form of literacy that might be developed to accommodate the multiple and situated nature of literacy particularly in the way in which literacy is pedagogized. The perception of literacy as an autonomous model is already well-entrenched in the literacy teaching and learning processes through the concept of schooling. This is manifested through the breaking down process suggested by Street (1995, p. 114) which has come to lead individuals to 'construct an autonomous model of literacy… often against their own experience… to conceptualize literacy as a separate, reified set of neutral competencies, autonomous of social contexts…'. What this study has highlighted is the need to re-think the ways in which we pedagogize literacy in order to adequately meet practice-specific needs. Towards this, we suggest a pedagogy of literacy for specific needs which will focus on a construction and internalisation of an ideological model of literacy. We, therefore, propose along with Street (1995); the objectification of literacy at work in contrast with school, re-thinking space and label of learning and creating new teaching methods and procedures, all geared towards recognising that literacy can be learnt, developed and utilised in social contexts.

Secondly, this study has implications for policy makers at local levels. The recognition of multiple literacies and an acceptance of the fact that it can be promoted in situations other than school setting require policy makers to identify and allocate resources to enable the development of literacy outside the school setting. This will involve resource allocation and creation of infrastructure. As developmental policies aimed at improving literacies, both for societal and personal development is an established goal of local policies, recognising the multiplicity of literacy, its situated nature and the potential for different ways of providing it becomes a first step in achieving this goal.

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Part 2

Pre-Service and In-Service Teacher Training

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CONSTRUCTIVIST FOUNDATIONS OF INTERCULTURAL EDUCATION: IMPLICATIONS FOR RESEARCH AND TEACHER TRAINING

Introduction

In modern societies, globalization, individualization, and pluralization of values and cultural norms are self-evident. Against this background, societal developments such as the omnipresent migration or the recognition of cultural minorities are conceived as circumstances that produce new cultural and social constellations. Accordingly, the current educational discourse states "diversity" as a crucial concept and claims an appropriate consideration of differences regarding culture, gender, or aptitudes. Thereby, recognition and appreciation of diversity constitute overarching aims of education and are seen as basic requirements for democracy and equality in modern societies (Prengel, 1993).

As central actors in education, teachers play a key role in dealing effectively with a culturally diverse student body. Tasks and challenges can be seen in two particular areas: Firstly, teachers and schools need to provide equal educational opportunities as immigrant children and minority group students are often disadvantaged within the school systems. This can be seen for instance in their overrepresentation in special education and in their underrepresentation in higher education (Petrović, 2010). Secondly, all school children, regardless whether they belong to a the ethnic minority or the ethnic majority, need to be prepared to live in globalized, pluralistic and culturally diverse societies; and one of the learning environments for that are the school classes and schools themselves (Petrović & Zlatković, 2009; Sieber, 2007).

How can teachers be prepared to deal with these challenges? Research on teacher competence shows that the teachers' personal dispositions are crucial for performing specific functions and tasks in teaching (e.g. Klieme & Hartig, 2008; Lipowski, 2006). Such dispositions correspond to deeply held beliefs, values and norms which are strongly anchored in individuals' subjective theories. These subjective theories may interfere with the normative claims inherent to the officially taught concepts how to teach productively in culturally diverse settings. The subjective theories, therefore, may constrain the implementation of these concepts – an issue that will be taken up later.

Subjective theories represent the individuals' cognitions about the world and their connected emotions, volitions and motivations (Dann, 1992). They express, therefore, the individuals' understandings and interpretations of how the world

functions; they express how individuals have constructed their worldviews, in other words: their realities. Hence, subjective theories have to be understood in the framework of a constructivist approach that stresses the argument that the perceptions of phenomena are never expressions of a so called "objective" world, but rather subjective reconstructions of personal experiences with the world and its phenomena (von Glasersfeld, 1984).

The following part outlines this framework of constructivist theories and shows how teachers' dispositions in dealing with cultural heterogeneity can be understood within constructivist approaches to Intercultural Education. This leads to the pivotal question how teachers actually construct their understanding of Intercultural Education which will be claimed as an important research desideratum in the second part. Thirdly, we conclude that the investigation of individual images of Intercultural Education is of vital relevance for both theory and practice.

Constructivist Approaches to Intercultural Education

In order to understand how student teachers, teachers or teacher educators regard matters of cultural differences and similarities, constructivist approaches ask how individuals' reality is being constructed and, therefore, what images individuals have created regarding cultural phenomena. In order to contextualize this approach, some general aspects of constructivism are outlined in a fist part and are, subsequently, applied to the field of interculturalism. This application will point to the fact that constructions take place on different levels of sophistication and complexity, a fact that is especially important for teacher training.

Theorists of constructivism have shown that reality is constantly constructed in interactions with others by assigning an individual meaning to an event or an experience (e.g. Kelly, 1955; Berger & Luckmann, 1966; von Glasersfeld, 1984). Based on our constructions, we expect other people to act in a certain way and we therefore anticipate their behavior according to the image we have created about them. We build hypotheses upon the way our reality works and in order to predict the behavior of others, and we test these hypotheses in an ongoing process of constructing and re-constructing. In this process, our worldview is sometimes being confirmed and sometimes challenged so that it needs to be enlarged or changed. We adapt our worldview according to the way we are able to perceive the events and experiences that occur to us and that we react to. Piaget (1970) developed this constructivist epistemology for educational matters and showed how the development of cognition is a constant process of oscillation between assimilation and accommodation of individual cognitive structures. Against this background, individual cognitions do not *match* reality, individual cognitions rather *fit* the world outside (von Glasersfeld, 1984, p. 21). Hence, subjective theories as expressions of individuals' cognitions fit the reality as long as they are "viable" (ibid., p. 22).

Applying this constructivist approach to the field of interculturalism, it becomes apparent that perceptions take place on different levels of sophistication and complexity. This complexity refers to sets of categories that are used to organize the perception of phenomena. According to Bennett (2004, p. 73) "more cognitively complex individuals are able to organize their perceptions of events into more differentiated categories." He adds that this ability usually refers to particular domains:

> For instance a wine connoisseur may be able to taste the difference between two vintages of the same variety of red wine, while a lay drinker may only be able to differentiate red wine from white wine. So a sophisticated sojourner can observe subtle differences in nonverbal behavior or communication style, while a naïve traveler may notice only differences in the money, the food, or the toilets. As categories for cultural difference become more complex and sophisticated, perception becomes more *interculturally sensitive*. (ibid., p. 73)

Bennett (2004, p. 62) claims that intercultural sensitivity can be seen in a six-level-model of development. Along this model, the first three levels take place within an ethnocentric worldview and the levels four, five and six within an ethnorelative worldview. Bennett's model describes a major change in the quality of intercultural perceptions when people move from ethnocentrism to ethnorelativism. Individuals with an ethnocentric worldview experience their own culture as only reference to construct their reality while the deeply held beliefs and behaviors from their primary socialization remain unquestioned. They are seen as "just the way things are". In contrast, individuals with an ethnorelative worldview experience their beliefs and behaviors as only one organization of reality among many other possibilities.

This constructivist approach to interculturalism points to two crucial issues: First, teacher students, teachers and teacher educators construct their images of cultural differences and similarities according to their constructions of reality. These images influence their thinking, feeling and acting in the context of cultural heterogeneity and may fit their personal experiences. But it is an open question to what extent the different images fit officially taught regulations and curricula. Second, these processes of construction and re-construction take place on different levels of complexity; perceptions can be organized into more and more differentiated categories. Regarding intercultural sensitivity and focusing on levels of perception, decisive differences between ethnocentric and ethnorelative worldviews have to be expected. In other words, teacher students, teachers and teacher educators will most probably have different images of cultural differences and similarities and therefore also upon Intercultural Education if they are in an ethnocentric stage of development or if they have developed an ethnorelative perspective.

Uncovering Images of Intercultural Education as a Research Desideratum

Against this background, understanding the different images of Intercultural Education is of pivotal relevance for teacher training institutions and constitutes, therefore, an important research desideratum. If teachers are supposed to implement productive concepts of Intercultural Education in their daily teaching, teacher training must not only communicate such concepts. But rather, teacher training is prompted to facilitate a fit between individual images, on the one hand, and productive concepts of Intercultural Education, on the other hand. As central actors in education, teachers' concepts and beliefs about integration, diversity, multiculturalism and plurality as well as about the specific educational needs of marginalized groups regulate to a large extent how respective policies are implemented and to what extent they reach the daily teaching. These concepts and

beliefs about Intercultural Education are strongly anchored in individuals' subjective theories and may interfere with the normative claims inherent to the officially taught concepts and curricula. However, only very sparse knowledge about these beliefs is available. The deeply held beliefs of student teachers, teachers and teacher educators are barely investigated in relation to Intercultural Education. Some findings exist that show a deficit view in the sense that minority children are perceived mainly as having problems and facing specific challenges, but not with their resources (Pantić, Closs & Ivošević, 2010; Steinger, Leutwyler & Lottenbach, 2012). However, hardly any evidence addresses the beliefs about the roles and duties of as well as the challenges for teachers and school systems regarding Intercultural Education.

The research desideratum of uncovering different images of Intercultural Education seems to be relevant in various contexts. This will be exemplified by the Swiss and the Serbian context, by two countries with very different histories and with very different political and social constellations. For the *Swiss context*, the relevance derives from the fact that migration flows have changed dramatically in the last decades. Migration nowadays is qualitatively different than migration 20 years ago. Whereas two decades ago, migrants came largely from socio-economically deprived classes looking for low-skilled jobs, migrants come nowadays from very diverse socioeconomic backgrounds, including more and more highly educated specialists with high affinity to educational issues. Furthermore, Intercultural Education includes nowadays the preparation of future generations to live in culturally diverse contexts and to participate productively in a global economy with all its intercultural challenges. Therefore, Intercultural Education is no longer limited to issues of integration of disadvantaged minority children. Consequently, Intercultural Education is prompted to consider different constellations and challenges in schools than 20 years ago. However, teacher educators, pre-service and in-service teachers might still cultivate the image of an "immigrant child" as 20 years ago. Furthermore, pre-service teachers that grew up in already very culturally diverse settings may have completely different experiences with intercultural encounters than their teacher educators who grew up in more homogenous settings decades ago. It may be assumed that these different contexts of growing up leave marks in the subjective theories and in the individuals' disposition regarding Intercultural Education. As the current concepts of Intercultural Education are strongly influenced by scholars and teacher educators having grown up in different contexts than pre-service teachers do, it is an open question to what degree the concepts of Intercultural Education as taught in teacher training fit the experiential background of the student teachers and, therefore, their worldviews that structure their perceptions and their daily teaching.

For the *Serbian context*, teachers' attitudes towards social and educational inclusion are recognized as an especially strong challenge (Pantić, Closs & Ivošević, 2010, p. 64). This challenge reflects the fact that Serbia has undergone various transitions: from a socialist country (with a strong emphasis on "homogeneity" and "uniformity") to an era of war (with its strong focus on ethnicity) and later on to the post-war constellation (dealing with requirements of the European Union that puts a stronger focus on the recognition of plurality and heterogeneity). Whereas the recently imposed policy discourse in Serbia (cf. the new Law on the Foundations of the Education System; NARS, 2009) focuses on "diversity" or "plurality",

traditional views emphasize more the notion of "homogeneity". Pupil diversity was not addressed in teacher training and mainstream schools and teachers were, therefore, never equipped with the knowledge, strategies and tools to address differences at all, and even less to address them inclusively (Macura-Milovanović, Pantić & Closs, 2012; Zlatković & Petrović, 2011). Nowadays, a special emphasis is given on different levels to the integration of Roma (cf., among others, the "Decade of Roma Inclusion" 2005–2015). However, attitudes and dispositions towards other cultural and ethnic minorities in Serbia have to be considered as well, especially toward Albanian, Hungarian, Croat and Bosniaks/Muslim (Biro et al., 2002; Zlatković & Petrović, 2009). The constellation of Serbia being a multi-ethnic country with a legacy of socialism and war is reflected in these major shifts in the official policy discourse. Therefore, similar as in the Swiss context, the concepts of Intercultural Education as taught in teacher training are elaborated mainly by scholars and teacher educators having grown up in very different contexts than pre-service teachers do. Therefore, also in the Serbian context, it remains an open question to what degree these concepts fit the experiential background of the student teachers and, therefore, their worldviews that structure their perceptions and their daily teaching.

Conclusion: Theoretical and Practical Relevance

These two very different contexts illustrate why it seems relevant to consider constructivist approaches in Intercultural Education and, therefore, to uncover different images of Intercultural Education. The relevance of uncovering these images of Intercultural Education is evident both on a theoretical and a practical level. The *theoretical relevance* of investigating images of Intercultural Education has to be seen against the background that the discourse about "intercultural competence" lacks a specific focus on teaching and schooling (Leutwyler, Steinger & Sieber, 2009). A vast body of literature defines normative claims for Intercultural Education and identifies the features of interculturally competent persons in general. But only very scarce approaches identify what intercultural competence means specifically for teachers: What does it mean to act interculturally competent in the school context? The specific challenge in the school context seems twofold: Firstly, there is the challenge to deal with cultural difference and to include the diverse cultural backgrounds; and secondly, there is a duty and a mission of modern schools to function as norm-setters – thus, obviously, intercultural competence of teachers has specifics that have largely remained undefined until now. Therefore, uncovering different images of Intercultural Education may be seen as a contribution to the specification of teaching-specific issues and challenges and teaching-specific facets of intercultural competence. In doing so, such type of research contributes also to theory construction in Intercultural Education. This contribution might result in the systematization and the development of a typology of issues and challenges in Intercultural Education, considering perspectives of different stakeholders in education. This allows for defining the specific requirements and conditions for teachers and teacher educators when dealing with cultural heterogeneity.

The *practical relevance* of investigating images of Intercultural Education has to be seen against the background that, in many countries, learning how to live in a pluralistic, multicultural society is still not a priority. Teachers have been found to

have a narrow understanding of Intercultural Education referring only to students with special needs, to immigrant students or to minority group students rather than having all students in mind as all students would need to be included into this learning process (Macura-Milovanović, Pantić & Closs, 2012; Sieber 2007). Furthermore, in many countries, different ethnic groups have different opportunities to succeed in education. Although many of these countries legally dispose of more or less appropriate policies regarding Intercultural Education, their implementation does not succeed appropriately. This may be shown in the cases of Switzerland and Serbia: Whereas the access to education is formally ensured also for marginalized groups in both countries, quality education considering the special needs of marginalized groups is not provided sufficiently both in Switzerland and in Serbia. This fact is reflected by the high percentage of school failure e.g. for Serbian children in Switzerland (Swiss Federal Statistical Office, 2008) as well as e.g. for Roma children in Serbia (Macura-Milovanović, Gera & Kovačević, 2010). It may be assumed that the more or less appropriate policies in this regard are not implemented in daily teaching – precisely because they do not fit the teachers' individual belief systems. The explicit connection of individuals' belief systems and normative demands of curricula and legislations has to be seen, therefore, as the key issue in Intercultural Education on the level of teacher training. Fostering productive dispositions of teachers will only be possible when contradictions, discrepancies and ruptures between the biographically imbued beliefs of individual actors, on the one hand, and officially taught claims of policies and curricula, on the other hand, are explicitly dealt with (Kidd, Sanchez & Thorp, 2008; Villegas, 2007).

Thus, the knowledge about deeply held beliefs are a basic prerequisite to prepare pre-service teachers for dealing effectively with culturally diverse settings. It allows for a better understanding of teachers' role conceptions and of the subjective meaning, importance and challenges regarding teaching in a culturally diverse setting. This allows for moving Intercultural Education from normatively imbued (and, therefore, mostly ineffective) top-down training to a need-based support of teachers. Uncovering images of Intercultural Education plays, therefore, an important role for preparing teachers to deal with the challenge of providing quality education for all and of preparing future generations for a just, democratic and pluralistic society.

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THEORY IN TEACHER EDUCATION: STUDENTS' VIEWS

Abstract

This paper investigates the views of Post Graduate Certificate in Education (PGCE) students' of the theoretical component in one of the modules in their teacher education programme. In this module students are exposed to the following theoretical frameworks: Empiricism, Critical Rationalism, Feminism, Critical Theory, African Philosophy and Existentialism. The aim of this paper is to reveal the students' views about: the volume of their work in the module, themes covered in the curriculum for the module, the relevance of the content for a South African context, what aspects of the content they found most interesting and whether it was understandable. Students were also asked to rate their prescribed textbook for the module and indicate bibliographical detail such as home language and age. The responses of the students show that student teachers recognise the important role theory plays in Teacher Education.

Introduction and background

Philosophical discourse in South Africa about the nature of education, teaching and learning has always been fragmented. Traditionally, there have been those educationists who have worked within the context of a Marxist and neo-Marxist paradigm, while others have located themselves within the more general context of what may loosely be termed "democratic liberalism" which propogates the democratising of schooling and individual empowerment. Then there have also been those who have pursued their endeavours in the analytical philosophy of education tradition emanating from the Institute of Education at the University of London. In other instances, philosophical discourse on education has been characterised by a structural-empirical methodology which has directed the work of educationists at the universities of the North West and the Free State. However, during the apartheid years before 1994, philosophical discourse about the nature of education, teaching and learning was dominated by the theoretical framework, identified as Fundamental Pedagogics, which was seen to provide the foundational landscape for apartheid education in the form of the system of Christian National Education. As such, theory was regarded as a crucial element in the hegemony of apartheid education and underpinned much of the work that was done in Faculties of Education at the universities of Pretoria, South Africa and Port Elizabeth. Moreover, theory was seen to fulfill a prominent role regarding teacher education in South Africa as it provided teachers with the theoretical foundation required for their professional training.

Developments in South Africa after 1994, however, led to the dismantling of apartheid and the abandoning of the assumptions which underlie and support the ideology of Christian National Education. After 1994 Fundamental Pedagogics was removed from the curriculum and Philosophy of Education courses at, for example, the University of South Africa (UNISA) began to expose student teachers to different theoretical frameworks in education (Higgs 2000).

In the light of this background the present article sets out to emphasise that theory plays an important part in determining the nature of educational discourse which includes Philosophy of Education. Theoretical frameworks guide the research efforts of philosophers of education in the sense that theoretical frameworks determine the education problems that are addressed as well as the adequacy of proposed solutions to these problems. It is, therefore, important to have a general knowledge of the various theoretical frameworks that influence educational discourse because educational discourse is guided by one or more presupposed theoretical frameworks. This means that philosophers of education in their critical reflection on educational theory and practice need to be aware of, and familiar with, the different theoretical positions informing and shaping educational discourse. It is thus necessary for philosophers of education to study and analyse the theoretical assumptions that influence the nature of educational discourse in order to ascertain the impact of these assumptions on educational theory and practice.

For teachers and students of Philosophy of Education this critical exercise is also imperative in establishing why and how one should study Philosophy of Education. Six different theoretical frameworks that influence educational discourse in Philosophy of Education are identified, namely, Empiricism, Critical Rationalism, Critical Theory, Feminism, African Philosophy and Existensialism. Each of these theoretical frameworks determines the methods used to conduct research into education, as well as, the formulation of educational theory and practice, even in teacher education.

But worldwide, Philosophy of Education in the critical consideration of theory and practice, is increasingly being omitted from teacher education programmes (Barrow 1990; Laursen 2007). For example, at the University of South Africa (UNISA) the theoretical component of a module in the Honours BEd was recently removed from the programme for teacher educators. It is in the light of this situation, that this paper emerges in concerning itself with the views of Post Graduate Certificate in Education (PGCE) students' at UNISA on the theoretical component of a module in their teacher education programme.

Aim of research

The aim of this paper is to critically review the perceptions of (PGCE) student teachers to the theoretical frameworks they were exposed to in their teacher education programme. The theoretical frameworks include:

- Empiricism: Empiricism has its origins in British and American philosophy. Empiricism claims that our most reliable knowledge comes from direct experience through the senses. (Higgs & Smith 2006(a):16; Higgs & Smith 2006(b):1-15)

- Critical Rationalism: Critical Rationalism encourages us to question everything we are told and to examine critically our own ideas. Critical Rationalism constantly asks: "How do we know this is true?" (Higgs & Smith 2006(a):30; Higgs & Smith 2006(b):94-109)

- Existentialism: Existentialism as a method of enquiry focuses on the following question: "What is the meaning of life?" Ignoring such an existentialist enquiry runs the risk of living what Socrates called the

"unexamined life". The unexamined life, said Socrates, is not worth living. (Higgs & Smith 2006(a):42; Higgs & Smith 2006(b):124-126)

- African Philosophy: African philosophy is a complex response to Africa's unique position in the world and human history. African philosophy challenges the arrogance of the West and asks the West to rethink its claim of cultural superiority. (Higgs & Smith 2006(a):54; Higgs & Smith 2006(b):82-93)

- Critical Theory: Critical Theory claims that all human societies, particularly large and complex ones, are corrupted and distorted by deep-seated power structures. These power structures influence the way we live, the way we think and, indeed the way we are. Critical theory claims that our first task is to thoroughly understand what these power structures are and how they operate – we should then work to dismantle these structures. (Higgs & Smith 2006(a):87; Higgs & Smith 2006(b):66-81)

- Feminism: feminism claims that the entire experience of 'being human" has been seriously distorted by masculine domination and the marginalisation of women. Feminism claims that women have, and are, denied basic human rights, and that men have shown themselves to be unworthy leaders of the human race by repeatedly indulging in acts of war, violence and abusive power relations. (Higgs & Smith 2006(a):102; Higgs & Smith 2006(b):39-54)

Context

The duration of the PGCE programme is one year. It includes teaching practice at a school for a total of ten weeks. The students are placed at schools by the teaching practice office of the Department of Teacher Education at UNISA. The programme includes the following:

- Nine compulsory education subjects which includes Psychology of Education and Socio-Pedagogics, Theoretical Frameworks in Education and History of Education, Special Needs Education, Health, Safety and Nutrition, Management and Assessment, Reception Year and Foundation Phase Didactics, Reading /Writing/ Spelling: First and Second Language, Teaching Mathematics, Science and Technology and Visual Arts, Music and Movement

- Ten weeks Teaching Practice

The admission requirements for the PGCE programme is:

- Grade 12 or a Senior Certificate and

- A recognised Degree with one school subject at least up to 2nd year level and

- Two official languages on 1st year level

- All teaching practicals must be done in South Africa

The research design

A survey design was used to collect data. A questionnaire formed part of an assignment which students had to post back to the lecturer. Students had to respond to open and close ended questions. The research questions were:

- What is your opinion regarding the scope of the work covered in this module?
- What is your opinion of the themes covered in this module?
- What is the relevance for South Africa?
- What is the international relevance?
- How do you rate the textbook?
- What is your home language and age?
- What aspect(s) of this section did you find the most interesting?

Population and sampling

All 300 students enrolled for the module constituted the population and sample of the research. The questionnaire was sent to all 300 students as part of their study package. Students had to respond to the questions in the questionnaire and submit it as an assignment to the researcher who was the lecturer for the theoretical component of the module. 198 Questionnaires were returned.

Research method

This is reflective research because it determines the views of PGCE students about the theoretical component of one of the modules in their teacher education programme.

Data collection

In order to determine what the views of students were on the theoretical component in one of the modules in their teacher education programme, questionnaires were sent to all students enrolled for the module as part of an assignment.

The responses of the students as recorded in the questionnaires they completed were scrutinised and recorded for purposes of determining how they felt about the theoretical component in their teacher education programme.

Results

The data were analyzed manually and the following data were collected:

1. Bibliographical data indicated that 38 (19%) students' home language was an African language, 105 (53%) were English speaking, 52 (26%) were Afrikaans speaking, 1 (0.5%) European and 2 (1%) spoke another language as home language.

2. The age of students ranged from 104 (52%) students between the age of 20-29, 51 (25%) between 30-39, 31 (15%) between 40-49 and 10 (5%) students above the age of 50.

3. 169 (85%) of the students felt that the volume of the work covered in the curriculum was manageable and 155 (78%) indicated that the themes covered in the module were adequate. 119 (60%) regarded the content of the themes as being relevant to the South African context.

4. The prescribed textbook: "Rethinking our World" was also rated. 115 (58%) felt the prescribed textbook was understandable and 127 (64%) indicated that the book is acceptable. Only 5 (2%) students regarded the textbook as "poor" while 25 (12%) indicated that it was difficult to follow.

5. Students indicated that African Philosophy and Feminism were the most interesting aspects of the theory section of the module.

Discussion

Philosophy of Education is not just a matter of acquiring specific technical skills, adhering to an established paradigm or conforming to a set of methodological rules. It is more a matter of learning to interact with those ideological constructs which have guided the research efforts of philosophers of education, in order to evaluate their impact on education theory and practice. Philosophy of Education can therefore be said to be a critical and oppositional discourse for understanding, challenging and responding to problems in education. However such a critical and oppositional discourse is dependent on a theoretical astuteness which is able to critically appraise the concepts, beliefs, assumptions and values incorporated in prevailing education theories and practices. A basic feature of theory is that it seeks to emancipate teachers from their dependency on practices that are the product of precedent ideological constructs by developing modes of enquiry that are aimed at exposing and examining the beliefs, assumptions and values implicit in the theoretical framework through which teachers organize their experiences and practices. It is therefore argued that without the necessary theoretical astuteness, teachers will not be able to interact critically with those cultural, social and economic concerns which direct impact upon their classroom practice.

Conclusion

The results of this investigation reveal that students have a positive view concerning the theoretical component in their teacher education programme. This is an encouraging finding because it means that students registered for the PGCE acknowledge the critical role that theory plays in teacher education. Their positive responses indicate that they recognise the importance of theory for practice in that theory guides research, and determines the problems that are to be addressed in education practice, as well as, the adequacy of proposed solutions to these problems. This in turn means that they are aware of how different theoretical frameworks inform and shape practice and education policy. The acquisition of such an awareness is imperative in preparing teachers to reflect critically on their practice and the demands that society makes on them as educators in the classroom.

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POLICY AND PRACTICE OF PRE-SERVICE AND IN-SERVICE TEACHER TRAINING PROGRAMMES AND FACILITIES IN NIGERIA

Abstract

This paper reviewed policy provisions for *pre-service* and *in-service* teacher training programmes and facilities in Nigeria. It also presented reviews on legislations, agencies involved in teacher affairs management in Nigeria, using the historical and case study approach. Data on teaching qualifications of University of Lagos (UNILAG) lecturers were extracted from the Handbook of School of Postgraduate Studies for 1983-1984, 1991-1995, 2007-2008 and 2009-2010 academic sessions. The paper found that some problems still existed despite efforts to improve the lot of the teaching profession namely: (i) qualified and interested Nigeria Certificate in Education (NCE) *direct entry* applicants in education are being short-changed yearly for reasons of limited spaces and carrying capacity as experienced in UNILAG; (ii) acute access problem into the regular *direct entry* bachelors programme led to disappointment of much younger, unemployed and inexperienced Unified Tertiary Matriculation Examination (UTME) candidates opting for *sandwich programme* in education; (iii) the bachelors' programme continued to be oversubscribed, leading to shortage of classrooms and lodging, poor quality of reading materials and stressful examination sessions; (iv) the danger of "teaching" without teachers in Nigerian universities is obvious and ominous. In UNILAG, for instance, only in the faculty of education was found an appreciable number (77% and 68%) of teaching staff possessing requisite teaching certificates in 2008 and 2010 respectively. The study recommended that resources for teacher training must be provided urgently and facilities be provided accordingly. Also, any teacher at any level of education in Nigeria must be professionally qualified to be accountable and productive in the spirit and letter of Nigeria's Vision to be one of the greatest 20 economies in year 2020.

Introduction

In Nigeria, the National Policy on Education (NPE) had undergone many reviews since inception in 1977. The 4th edition (FGN, 2004, S. B ss. 70a) stressed that *"since no education system may rise above the quality of its teachers, teacher education shall continue to be given major emphasis in all educational planning and development"*. Owolabi (2005) submitted that "a policy is a statement that consists of a plan by some **agent (A)** to **do** something **(D)** in particular, whenever particular **conditions (C)** obtain, for some **purpose (P)**". According to him, policies of teacher education deal with what the relevant authorities (education ministries, school management boards and teacher training institutions at degree and pre-degree levels) must be doing or be putting in place on a continual basis to enhance the quality of teacher education. In S.8 of the NPE (FGN, 2004) the goals of teacher education are to produce efficient classroom teachers for all levels of the educational system enhance their commitment to the teaching profession.

The policy thrust on training, employment and professional development (S.8 B ss.75-77) further noted that in-service training shall be developed as an integral part of continuing teacher education and also shall take care of all inadequacies. It also says that those already engaged in teaching but not professionally qualified shall be given a period of time to qualify for registration or leave the profession.

Education workers in Nigeria undergo *pre-service and in-service* training programmes. *Facilities* for professional training and development of teachers abound in Nigeria in colleges of education (for primary and junior secondary schools) and the education faculties and institutes of the universities (for senior secondary schools). The National Teachers' Institute, Kaduna is for continuing teacher education (currently for teachers of basic education). Equally, some polytechnics with schools of education also produce teachers of technology for the secondary school level. Nigeria has the National Institute for Nigerian Languages in Enugu and the National Mathematical Centre in Abuja (Education Sector Analysis, ESA, 2003 and FGN, 2004).

Truly, Nigeria needs to focus on quality teacher training because no nation's education can rise above the level of its teachers. Ijaiya (2008) noted that for Nigeria to be one of the world's best 20 economies through Vision 20-2020, it needs a virile, high quality educational system that will make Nigerians active participants and not on – lookers. This paper reinforces these facts, hence, a review of what the nation has and an assessment of her capacity to produce a virile and proactive teaching force through an equally vibrant and transformational teacher education with adequate support system.

The Practice of Pre- Service Teacher Training and Competences Required

To start any training venture, certain skills and competencies are necessary. Peretomode (1999) used Katz's (1955) classification as *technical, human* and *conceptual*, referring respectively to the proficiency or ability to use tools, methods, processes, procedures and techniques of a specialized field (e.g., teacher education) to perform special tasks. The school teacher needs enough technical skills to be able to succeed; ability to work effectively with, and through other people on one-to-one basis and in a group setting; and knowledge of subject-matter, or, the mental ability to coordinate and integrate the entire interests and activities of the organization and apply information and concepts to practice.

Policy on Professionalization and Legislation on Teaching in Nigeria

In Nigeria, normal training programmes of teachers are offered at different post-secondary institutional levels. There used to be *Grade II* Colleges (for 1 – 2 years). At present, Colleges of Education (Conventional, Technical or Special for 3 – 4 years) and at the University level.

Nigerian authorities have resolved to encourage teacher education programmes to enhance adequate supply and total professionalization of the teaching. Meanwhile, the NCE is already accepted as the minimum level approved to be possessed by a teacher in the professional employment of schools (FGN, 2004:S.8, ss.70b). The Nigeria Union Teachers (NUT) further established the Institute of Certified Teachers of Nigeria (ICTON) "as a gate way of professionalism" and "to

mobilize men and equipment for a befitting data-base for its membership and ensuring that those it hopes to serve are duly informed of its aims and future plans" (ICTON *Editorial,* 2001).

 ICTON finally became a gate way to professionalism in teaching in Nigeria. It was registered on May 20, 2000 (RC 384,181/3) and was notified by the Corporate Affairs Commission, (CAC) on July 11, 2000. On 25th May, 2000, the NUT, in a national workshop in Akure, deliberated on the *Teachers' Registration Council Decree 31 of 1993* to empower the TRC to regulate entry into the teaching profession in Nigeria.

 Nigerian teachers now belong to a professional body *ICTON* that will hopefully include all teachers at all levels of education. When this is concluded, the re-engineered teaching service will be professional, strong, and respectable. Since May 2001, many applications for membership were received, and processed into the association's database. More encouragement is being given by the NUT at all levels to enlist. In fact, up to the University level, forms were already distributed to all practitioners and those who are yet to professionalise fully are being mandated to do so with ultimatum attached that "*all teachers in tertiary institutions shall be required to undergo training in the methods and techniques of teaching*" (FGN, 2004 S.8 ss.61).

 Membership is open to serving teachers in public and private institutions, university teachers in departments and institutes of education, consultants and other providers of educational services, retired and other persons with requisite qualifications who are desirous of contributing to the process of professionalising teaching in Nigeria.

 Qualifications for Admission as approved by the TRC
 Eligibility for admission to the ICTON includes:
 1. Grade II Teachers Certificate (holders in teaching continuously for not less than 5 years before the commencement of registration for membership of the Institute);
 2. Other Certificates not higher than the NCE (Grade II Teachers Certificate is a pre-requisite);
 3. The NCE or its equivalent;
 4. A First degree in Education of an approved university;
 5. A First degree of an approved university or its equivalent in addition to a PGDE obtained in not less than nine months of studies;
 6. A Masters degree in Education for which a first degree or a PGDE is a pre-requisite; and
 7. A Doctorate degree in Education.

 In case of a non-Nigerian, if a person holds a qualification granted outside Nigeria which for the time being is recognized by the TRC and is by law entitled to practice as a teacher in the country in which the qualification was granted, provided the country accords Nigerian professional teachers the same reciprocal treatment and that he/she has had, in the opinion of the Institute, sufficient practical experience as a teacher.

 Any other qualification as may be determined by TRC as being acceptable for teaching in Nigeria and are acceptable to ICTON. In addition, persons who do not have the listed admission qualifications will be able to apply at a later date to be

admitted as students of ICTON in order for them to complete their preparations for acquiring any of the listed qualifications.

In 2002, a handbook of the Council was published during which registration forms were also distributed and are still being distributed) to schools and institutions towards professionalization., hope is rising steadily for pre-service teacher training considering the increasing enrolment into teacher training programmes in Nigeria's tertiary institutions including the programmes of the National Teachers' Institute (NTI), Kaduna, set up by the Federal Government. There are also several education degree-awarding Colleges of Education such as in Owerri and Ondo and the first of its kind, the up-graded Tai Solarin University of Education in Ijebu-Ode, Ogun State, Nigeria.

The Practice of In-Service Teacher Training

The objectives are, among others, to:
1. expose serving teachers to the content and modern methodologies of teaching all school subjects and prepare them for new leadership roles;
2. enable serving workers to improve academically and professionally at lesser cost to them and at little or no cost to government;
3. make staff members work together through in-service programmes in workshops, conferences, and study groups in areas of common interest for professional growth and competences.

Various Modes of In – Service Training

They include evening courses, day release, short or full time courses, vacation courses, workshops and seminars, teachers' centre-based courses, Radio-TV courses, distant correspondence and open learning, study leave, research leave with pay, sabbatical leaves, etc, (Akinyemi, 1991). In addition, Arikewuyo (2006) identified orientation programme, coaching, job rotation, temporary promotion, assisting a junior officer with good potentials to gain experience, and committees. Peretomode (1999: 5) also outlined further education, experience and mentor – mentee relationship.

Methods, Structure and Management of In-Service Programmes in Nigeria

Akinyemi (1991) identified ten *methods* but five are discussed in this section.

1. *Induction:* When College and university education students prepare for teaching practice, resource persons present seminars on topics such as classroom management and discipline, continuous assessment, school records, lesson notes preparation, teachers' personality, e.t.c. Such induction programmes may last for one or two days (Akande, 2001: 27-41 and Awoniyi, 1979: 63-67).

2. *Orientation* helps to build staff confidence and boost productivity. Teachers are informed about school regulations, organizational patterns, structure, the curriculum plans, instructional materials and equipment, pupil services, day-to-day activities, curricular activities, school records and procedures for keeping them.

3. *Workshops and seminars are* done to update knowledge and skills of staff in their subject areas, especially whenever a new curriculum is introduced. It is to acquaint employees with the new procedures, new communication systems, new topics or subjects, new policies, etc. Reports generated from such exercises are equally used for planning and policy purposes. Nigerian training institutes include the *National Institute for Educational Planning and Administration (NIEPA), Ondo,*

Ondo State and, the *Lagos State Post-Primary Staff Development Centre (LSPPSDC) Magodo, Lagos.*

4. *Professionalization* through in-service education for graduates of Polytechnics and Universities who, having teaching appointments or needing to start their own schools, need to professionalise. Teaching in Nigeria is currently witnessing a lot of revitalisation in many respects. There are notable programmes in place for these categories of 'teachers'. For HND holders, the Federal College of Education (Technical), FCE(T) Akoka, Lagos, a one-year intensive postgraduate course formerly called Technical Teachers Diploma (TTD) exist. It now bears Postgraduate Diploma in Education and is designed by TRCN. For non-education graduates, the PGDE exists on *full-time* or *sandwich* modes for one or two sessions respectively.

Around 2004, at UNILAG, the Faculty of Education packaged a special in–service training programme for other academics or lecturers in other faculties who were 'teaching' without professional pedagogical skills and competences. They were to be encouraged to acquire such a professional diploma teaching certificate to secure their jobs as university teachers. This trend would have redressed the snag of unprofessional hands rendering a professional service with obvious implications on effectiveness and efficiency, manpower development, student learning and mentoring, professionalism, role perception and productivity. The programme, which received some warm embrace, had since been stalled for bureaucratic reasons.

5. *Higher qualifications:* Professional teachers may desire to obtain higher degrees to qualify for higher responsibilities and improved earnings. Such may be *Grade II* Holders gunning for the NCE certificate, NCE Holders seeking first degree certificates, bachelor's degrees Holders enrolling for Masters and Masters Holders running Ph. D programmes in their choice institutions. These programmes exist in direct entry full-time, part-time, sandwich, correspondence and distant learning modes.

Undergraduate admissions are offered by direct entry mode or through the UTME. In UNILAG, it is always stressful, attracting a big chunk of the total JAMB annual applications nation-wide, leading to the university screening above its carrying capacity of 4,992 in 2009/2010 session (Ojerinde, 2010).

The Faculty of Education had been adversely affected since 2003. Candidates from the University's one-year Foundation Diploma programme not admitted in other faculties are always imposed on education faculty's *direct entry* bachelors' programme list, to the detriment of the more qualified applicants with NCE whose originally interest is education.

The *structure* and *management* of NCE, B.A. Ed., PGDE, M.Ed. and Ph.D programmes are noteworthy. The following programmes are highlights:

(i) The NCE primary sandwich programme which is run by Colleges of Education has two categories of students:
- The *Grade II* teachers who spend five years.
- The *Associateship Certificate in Education (ACE)* holders who spend four years to qualify as primary school teachers.

(ii) The B.A. (Ed.) Sandwich programme originally designed for NCE holders is now subscribed by younger graduates of senior secondary schools in some institutions like the UNILAG because of frequent disappointments suffered by

applicants into the regular first degree programmes. The long vacations are utilized for intensive lectures for about six to eight weeks running between 8 am to 6 pm daily, including weekends. Many other universities are involved especially in city centers where the demand continues to increase.

Also, applicants for the Masters programme are education graduates with or without PGDE certificate while applicants for the PGDE programme are mainly non-education graduates who desire to convert to the teaching line to make a career. These programmes run full-time, part-time or sandwich in the Faculties of Education nation-wide.

General Findings on Response to In-Service Courses

Student response to in-service teaching courses is growing fast with increasing awareness of inherent benefits like job security, bursaries, psychological relief, self realization and actualization enjoyed by participants, etc. Subsequently, old and young teachers keep enrolling even when it is evident that having the certificates has little or no impact on their earnings and promotion. Yearly in UNILAG, some sizeable numbers of younger *direct entry* JAMB candidates are found switching to the *sandwich* programme, after many failed attempts to secure regular admissions.

Most in in-service programme participants experience family problems and a lot of stress with attendant adverse consequences on family stability and health. Other challenges include high cost of reading materials, limited classroom and hostel accommodation, time for study and research, poor guidance and counseling facilities, missing grades, and distance, causing many to miss their vital examinations.

In many Nigerian universities are lecturers not trained as teachers; hence the system faces the danger of 'teaching' without teachers! In UNILAG for instance, in 2009 and 2010, Faculty of Education had 77.3% and 68% of lecturers possessing teaching qualifications such as NCE, B.A. Ed., B.Sc. Ed., PGDE or M.Ed. degrees. Education was followed by Arts (0.60%), Social Sciences (0.05%) and Sciences (0.05%). Other faculties simply had none.

Recommendations

The efforts to shove up the quality of teacher preparation and development becomes more imperative because of the popular policy statement that correlates the quality of standard of education in a nation with the quality and standard of its teachers as no one can offer that which he has not. Therefore, the following quality control and quality assurance measures must be pursued:

1. Authorities must match admissions with institutional carrying capacity and resources. Also, facilities for teacher education must be expanded.
2. Rigorous planning and monitoring of teaching, teaching practice, and evaluation processes.
3. Exposing university lecturers without teaching certificates to pedagogical training to repackage them for future challenges. This is a challenge the NUC and universities should treat with dispatch.

4. The curriculum of teacher training institutions be revised regularly to address the content, skills, attitudes, values that student teachers have to learn in training to be relevance and effective.
5. The rate at which Nigeria is losing experienced teachers to retirement is high even when it is evident that many are still physically fit and mentally alert to contribute more than a new comer (Owolabi, 2007). Signing into law of the recently approved bill on raising the retirement age of university teachers to seventy years is also paramount to avail the system valuable experiences like elsewhere in the developed countries.

Conclusion

Training and development of education workers is "a task that must be done" and sustained if the system is to revive for relevance. For instance, Omoregie (2004) noted that "good administrators are developed" and that:

> There is nobody that comes into any organization as a finished product, a perfect match. Workers, at one stage or the other have to pass through some form of training and development… these involve activities set to change behaviour of people in the school system so that performance can be improved upon. Development refers to provisions made by an organization like the school system for improving the performance of school personnel from initial employment to retirement (p. 154).

The above position captures the essence of this paper. As school workers, continuous exposure to new ideas, methods and skills will keep us relevant and productive.

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STUDENT PERCEPTIONS OF THE DISTANCE EDUCATION MODE COMPARED WITH FACE-TO-FACE TEACHING IN THE UNIVERSITY DISTANCE EDUCATION PROGRAMME

Abstract

This paper is based on a study of the perceptions of the distance education mode compared with face-to-face teaching on the part of students on the university distance education programme at the University of Antioch over the period from 2001 to 2007. It is not possible to ignore the close links between educational processes and social, economic, administrative, cultural and political conditions, not only at the beginning of the course, but throughout its existence. The goal of higher education is to promote the development of a professional approach on the part of its students, irrespective of whether they study at a distance or physically attend a campus of the university.

When comparing the two modes of delivery (distance and face-to-face) in higher education, while controlling for a number of other personal and demographic variables, it was possible to confirm that there were no significant differences that could be attributed to different modes of delivery. This is not an accident, and arises because of the pedagogic orientation of the primary and secondary schools, which direct their efforts to the delivery of information and the development of basic skills rather than the development of students who are skilled in observation, analysis, synthesis and have leadership qualities which would fit them to direct the process of social change.

Introduction

The study "Student Perceptions of the Distance Education Mode Compared with Face-to-Face Teaching in the University Distance Education Programme" is an integral part of the evaluation of the internal and external effectiveness of the Distance Education Programme of the University of Antioch.

Theoretical Scope

Object of the Study

The object of the study was to analyse perceptions of the distance education mode compared with face-to-face teaching in the University Distance Education Programme of the University of Antioch.

Research Questions

- What methods does the University of Antioch use to assess students?
- What was the overall perception of students of the distance education programme, compared with face-to-face education?
- Were perceptions dependent upon the age of the students?
- Were perceptions dependent on the educational experience of the students?

- Were perceptions dependent upon the number of credit courses taken?
- Why are there no significant differences between the ways in which students perceive distance education and their perceptions of face-to-face education?

Theoretical Bases

The experience of the University of Antioch in the 1970s made it possible to conclude that the method of delivering education should be more flexible, in a way that would support and encourage team work, overcome individualism and promote divergent thinking. That experience arose from a context where a simple model of technology was implemented, which did not require great investment in sophisticated equipment that would need to be imported.

At the same time it was thought to be important to stimulate educational research, in order to develop an educational approach that was adapted to the conditions prevalent in Antioch.

The other position taken in the development of the project of the "De-Schooled University" (or possibly "Open University" (?)) was that it was essential to address two levels of understanding of educational technology: the intellectual level which involved the theoretical foundations for planning the curriculum, and the technical level which involved the development of models and logistical provision to underpin the development of the process.

At the intellectual level, there was also an effort to describe the aims that should inform the educational process, which would become a guide for the design of the form and content of distance education programmes and for the selection of the approaches suitable for its development (Arboleda [1]). The project adopted an attitude of permanent criticism and self-criticism with a view to evaluate and renew the models used in the design and presentation of teaching, the production of materials, the process of administration of teaching / learning based on a parallel process of research, and the development of a simple technological model which did not imply heavy investment in sophisticated equipment (Arboleda [1], Briones [2], Pisanty [3], Cabero [4], Cabero [5], Cabero [6], Cabero [7], Gisbert [8], Martínez [9], Román [10], Padula [11]). The inertia of the teachers who were involves in face-to-face education meant that there was a tendency to apply the same methods as they used in the classroom in distance education, which reflected a very mechanical approach to teaching (Román [10], Pádula [11]).

Objective

To study the perceptions of the distance education mode compared with face-to-face teaching on the part of students in the University Distance Education Programme.

Methodology

The study of the perceptions of the distance education mode compared with face-to-face teaching in the University Distance Education Programme was an ex-post-facto study.

Population

2166 students in the Distance Education Programme.

Sample

Based on the results of a pilot study to test the research instrument to be distributed to the students, it was decided to use a sample of 300 distance education students, with a view to obtaining results with a tolerance of 0.06, a statistical significance exceeding 95% and a Quasi-variance in the population of 0.28. This sample was then allocated to the different regional centres in proportion with the number of students at each centre. The sample was also balanced in terms of gender and number of credits taken, so as to be representative of the whole population.

The Research Instrument

The research instrument was distributed to the subjects finally selected for the sample. The instrument was distributed at the regional centres on days that had been allocated for tutorials. 275 questionnaires were eventually returned.

In order to collect the information to meet the objective of the study, individual and group interviews were used, as well as focus groups and a questionnaire distributed to students on the distance education programme.

The questionnaire was constructed to collect information on three scales, each of which contained items that made it possible to distinguish between the three attitudes that the students could adopt with respect to the course on which they found themselves enrolled.

Each scale was validated by obtaining expert opinion, and by conducting a pilot study. These provided reasons for confidence in the scales. The Spearman-Brown coefficients were 0.65 for Scale 1, 0.80 for Scale 2 and 0.78 for Scale 3. Using a process of item by item intercorrelation, the instrument was refined in order to make sure that there was consistency between items.

Variables

- Gender: Male, Female
- Age: 22 years or less, Between 23 and 30, Over 30 years
- Educational experience: Less than 3 years, Between 8 and 15 years, 16 years or more
- Number of credits taken: Less than 40 credits, Between 41 and 80 credits, More than 80 credits
- Place of work: Medellín and its surroundings (Santa Fé, Rionegro, Cisneros, Fredonia); Central Magdalena, Lower Cauca and Urabá (Apartado, Caucasia, San Carlos, Puerto Berrio, Frontino and Segovia); Intermediate Zone (Yarumal, Támesis, Sonsón and Andes)
- Zone: Urban, Rural

Analysis

The attitude students in the University Distance Education Programme in relation to the distance education mode compared with face-to-face teaching was measured on a scale using ten (10) items, which made up part of the general questionnaire distributed to students, and using open–ended questions in the same questionnaire. The answers to the latter addressed various operational aspects of the programme, and were considered to be among the important elements that shape the attitudes of the students to the Distance Education Programme, given that these form

a pre-requisite for study and have had a major impact on the attitudes of students in distance education.

A measure of the general level of satisfaction on the part of the students was sought, as well as the data to achieve the objective of the study.

From a sample of 275 students whose views were collected, 211 answered Question 18 of the questionnaire ('If you have any further comments with reference to the perception that you have of the Distance Education Programme at the University of Antioch, please write them here.') which was designed to collect all other comments about the programme. In the various answers to this question, students concentrated their attention on indicating deficiencies in the way that the Distance Education Programme functioned, and the incidents that affected the effectiveness of the course, although they identified as many things that were external to the course as internal. The students mentioned their overall judgements about the validity of the programme and the extent to which it developed skills and habits that supported independent learning and the meeting of the development needs of the province. On occasions they indicated their evaluation of the general aim of the programme, as part of 'an unprecedented educational plan whose object is to end, little by little, the dominance of the university that requires attendance', or the uncritical and demotivating impact of distance education and the false hope that it offers of democratisation. The responses to this question tended to be extreme, both positive and negative.

At a general level, also, the pioneering work of the University of Antioch in developing wider access to university was recognised, as well as the relatively small budget that had been given for the project, the efforts made by the administrative personnel and teachers associated with the Distance Education Programme. At the same time, students made suggestions for the improvement of the programme, such as better support for the educational technology on the part of the University, better publicity to secure wider recognition in the community, reducing fees, wider coverage within the programme for professions other than teaching, and greater consideration being given to the needs and circumstances of students, above all in the development of media and study materials.

From the above it can be concluded that the greatest impact on the views of students in relation to the operational aspects of the programme was negative. The factors that were most influential in creating this view of the Distance Education Programme were the lack of information for the community, the instability in the administrative system and the financial support, and a lack of trust in the national system of distance education, primarily owing to the sense of improvisation that pervaded the whole system.

With reference to the direction and organisation of the programme, the students drew attention to the lack of appropriate information about assessment, tutorials, the use of the Internet, access to media and materials, university systems to support the well-being of the students, and the operation of the programme and the University in general. Similarly, they complained about, "Sudden changes in the timetable without warning, explanation or justification", discrimination against distance education students compared with face-to-face students, as a result of which they felt that they had been under-valued by the University.

The use of media and the educational materials received the greatest volume of comments made by the students, who mentioned the doubtful quality of the tutorial staff (in terms of their commitment, responsibility and training), the shortage of tutorials, a lack of coordination between preparatory material and the content of tutorials, poor timetabling of the tutorials, low quality of the materials, the high costs, difficulties in following the course and failure to respond to complaints.

In relation to the assessments, they complained that the assessments did not cover the same material as the tutorials, that assessments relied excessively or exclusively on essay type questions, "in which marks were lost for not agreeing with the teacher", questionnaires were too long and with too many questions that were highly subjective, no account was taken of the shortage of resources in the research studies, little attention was paid to checking notes, results from assessments were returned late, assessments relied too heavily on material that could be memorised, some of the examinations included errors, and that a number of the teachers on the programme had the attitude that they should "belittle and demoralise the student".

The comments and complaints of the students, were not restricted to finding fault, but were coupled with concrete suggestions of ways to overcome the difficulties as part of the support offered by the students for the improvement of the Distance Education Programme. This was symptomatic of the critical attitude of the student body, and the awareness of the effect that shortcomings in the programme could have on students, and, through them, on potential students of the Distance Education Programme.

The students recommended that, as a response to their suggestions, a strategy should be sought to reduce the costs for individuals, and improve the channels of communication between teacher and student, possibly through the use of a one-stop advice centre.

The students also indicated the need to consolidate the programme, coordinating the criteria used by the teachers preparing the materials and those involved in providing the tutorial support. There was also the need for better management of general information and the need for tutors to be more thoroughly trained in the methodology of distance education, for decentralisation of the administrative processes of enrolment and the creation of sub-branches of the library at different regional centres.

The students indicated that the modules (texts and guides) were incomplete and repetitive. They asked for greater clarity in the contents and in the variety of examples that were used to support comprehension of themes.

Other issues that were raised, though less frequently, referred to the lack of a critical analysis of the contents of the programme, a possible increase in the use of radio, and increasing the coverage of the curriculum accessible by radio, and on increased recognition of the value of distance education on the part of the community.

The statistical analysis of the evaluation focused on ten main areas, notwithstanding the broad range of comments mentioned above. However, those general comments provide the context for a fuller and theoretically more precise understanding of the analysis conducted in terms of the original design, which addressed socio-demographic variables.

Taking into account the responses of the students, it was found that distance education (DE) was given a measure of value which was lower than that of face-to-face education (F2F), on account of a broad range of responses that gave an unfavourable rating both to the course itself and the distance education mode in general. However, when we look at those results in conjunction with the views of those students in relation to some of the operational aspects of the programme, we find that the students, before they could evaluate the general issues of distance education had to deal with a whole range of very practical issues, which touched upon failings in the administration, direction and finance of the programme, shortcomings of the part of the tutors and materials, changes of dates and delays in the delivery of instructional material and assessment instructions, which added up to produce a perception of the programme as part of a rigid educational policy at the level of the national government.

A result of 3.12, on a scale from 1 to 5, indicates a degree of indecision, and should be interpreted as a judgement in negative terms on the programme. In effect, no pronounced improvement that could be associated with the mode of delivery was found. On the contrary, students agreed with the suggestion that, "The distance education mode promotes poor quality professionals", and raised doubts about the effectiveness of face-to-face education as a means of preparing professionals, and thought that it was more convenient to study through distance education and that distance education could cater better for the differences between individuals. At the same time they saw it as a disadvantage that they were not able to mix freely with other students.

Notwithstanding these attitudes, there were other students who favoured the mode of distance education and identified strongly with the expressed aims of the programme, recognising that they were studying in that way because it suited their personal tastes or circumstances, and those students found that the programme substantially met their expectations.

The equivalence of the qualification obtained, from the point of view of society in general, is not clear. The outcomes, and graduates, of the Distance Education Programme have not been universally accepted. That is to say, this will only become clear once it has been possible for employers to develop an understanding of the quality and value of the professional development of graduates.

In each of the items in the questionnaire, respondents were asked to provide a grade from 1 to 5, where 1 represented complete disagreement and 5 complete agreement with the attitude being measured.

The major weight that reduced scores relating to the value attached to distance education when comparing the two modes of study was apportioned to the items which examined discontent with the operational aspects of the programme (items 3, 7 and 9), from the impossibility of comparing the final outcomes of the two modes (item 6) and from the higher rating that was given directly to the question of the quality of higher education and the high quality of development of personal skills which have traditionally been achieved through face-to-face education (items 4, 5, 8 and 10).

By cross tabulating the relative perception of the two modes of higher education with a range of control variables, it is possible to arrive at the conclusion that there are no significant differences that are directly attributable to those other variables.

Neither age nor gender, educational experience not number of credits taken, not even the location of the programme in different socio-geographic regions nor the subject studied nor the place of work (urban or rural) accounted for any of the significant variation in perceptions of the two modes. In all cases this remained steady at about 3.0, a score that indicated little commitment to either mode of study.

The only variables which showed even the slightest tendency to reduce the favourability of the perception of the distance education mode were age, level of education and number of credits taken.

One can see a slight increase in commitment to the distance medium as the age of the respondents increases. This tendency is even more marked if one looks only at the responses related to the impact of the Distance Education Programme on its students in their roles as teachers, and about the status of the programme in the community.

The attitude towards distance education improved directly in accordance with the length of time that the respondents had been linked to the education system, and a similar result for the number of credits taken.

Conclusions

The students focused their attention on signalling the shortcomings in the functioning of the Programme of Distance Education. With reference to the direction and organisation of the programme, the students pointed out the lack of appropriate information relating to assessment, tutorials, supply of media and materials, services supporting the well-being of students and the functioning of the programme and the University in general. When comparing the distance mode with face-to-face education, the perception of the students was lower, indicating an unfavourable judgement of the programme and of the mode of distance education.

The students expressed their agreement with the statement that distance education promotes poor quality professionals.

By cross tabulating the relative perception of the two modes of higher education with a range of control variables, it is possible to arrive at the conclusion that there are no significant differences that are directly attributable to those other variables. Neither age nor gender, educational experience not number of credits taken, not even the location of the programme in different socio-geographic regions nor the subject studied nor the place of work (urban or rural) accounted for any of the significant variation in perceptions of the two modes. In all cases this remained steady at about 3.0, a score that indicated little commitment to either mode of study.

This is not an accident, and arises because of the pedagogic orientation of the primary and secondary schools, which direct their efforts to the delivery of information and the development of basic skills rather than the development of students who are skilled in observation, analysis, synthesis and have leadership qualities which would fit them to direct the process of social change.

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ENVIRONMENTAL EDUCATION: FROM THE PERSPECTIVE OF SCIENTIFIC KNOWLEDGE FOR CONSTRUCTIVIST LEARNING

Introduction

The vision of environmental education is that it should raise the level of critical thinking and reflection as the appropriate basis of the activity of human beings, develop thinking on a higher plane, so that they can think about the future that they desire and how they wish to live, not merely focusing on the present. This will involve changes in the way people think, how they analyse, interpret and act. It involves a transition from the individual to the group, to team work, and producing changes in personal habits to motívate and sustain changed relationships with the people that we live with, neighbours, colleagues and friends, inside and outside the immediate locality. There needs to be strategic engagement, orienting and applying the basic habits of thought to the world they inhabit.

At the same time, environmental education is not merely a modern form for the didactics of natural science, but is, on the contrary, an educational process that integrates ecological knowledge, philosophy, politics, economics and sociology, among others. This is because its purpose is to change the relationships of production, social structures of economics and cultural patterns, which include both the individual and the collective, with the intention that the present generation, and future ones, should change how they live, so as to develop the members of contemporary industrial society in a new historical context of a worldwide environment.

The Epistemology of Environmental Education

On the 5 June 2010 there were two seminars. The first was given by a professor of higher education, who presented a study of the variety of flora and fauna that exists in the locality of Lázaro Cárdenas, Michoacán. He pointed out that it is not necessary to go to Brazil to see the great beauty of vegetation, but he did not mention the environmental problems there are in the city, as much for industry as for the community. The second seminar was about a project to protect a "green belt" to contain the industrial pollution inside and outside the factories. While the first seminar dealt with general issues without discussing the problematic of the environment, which could have helped students and employees in the factories understand their situation, the second seminar referred to establishing a response which did not address the root causes of the problematic of the industrial environment, namely, Why is pollution produced? What causes it? And how can the owners, managers and employees in general prevent pollution rather than merely containing it? For this reason Leff (2003) suggests that there is a crisis of knowledge, a selective blindness, which everybody knows exists, but nobody knows how to correct, much less avoid in the first place.

For this reason it is necessary to bring introduce an environmental education which will transform and reform in educational planning, where management will be

in the vanguard of change, guiding and participating in the struggle to transform the school to promote critical thinking, first among teachers and later in the studies of their students, so that they can promote activities and remedial action and raise questions about the environmental problems that result from the globalisation of the world through a consumerist economy. It is essential and urgent in the twenty first century that we construct a new vision based on critical thinking that will promote changes in attitude that are not merely cosmetic. This is confirmed by the work of Morin (2002) who states that human beings are victims of the separation of nature, culture, and humanity, which follows the split in the way we live and our physical and social natures.

It follows that there is a need for an environmental education which promotes constructivist learning and helps in the rebuilding of the ways we think to bring about sustainable development to control, reduce and improve the present environmental crisis. As Rodríguez (2010) says, we face an emergency in the clash between our knowledge and our dreams of other possibilities where egoism and individualism are not privileged together with greed, the power of money, hedonism and unbridled consumerism, but on the contrary where e can advance an inclusive, democratic, sustainable and compassionate society. As Leff (2000) observes, the environmental crisis is not ideologically neutral.

The environmental crisis is a matter of knowledge, because it is possible to examine the rationality of the current system of economics which, without any doubt, is bringing about the global destruction of the environment. As Leff (2001) notes, theory, to the extent that it creates a cognitive picture of what is, produces a transformation in practice. Leff (2001) suggests that epistemology is a strategy for environmental management, bearing in mind that knowledge is not constructed independently or in an ideological vacuum.

According to Leff (2000), environmental epistemology is a policy of seeking a sustainable way of life, taking into account flora and fauna, so that there is a link between all modes of life in the world, and people can live in harmony with nature. Environmental knowledge supports elements that help to transform attitudes and abilities in relation to the locality.

Philosophy in Environmental Education

Environmental philosophy holds up a utopian vision of an ecological civilisation, which encourages a new political Project, including economics, and sociology in the humanities (Zamudio, 2005). Industrial civilisation is hegemonic in nature, and promotes the modern concept of quantitative progress, growth in production, improved well-being in spite of damage to the natural environment, without considering the future.

For these reasons we need a new paradigm that moves us away from traditional development, which allows improvement in the quality of life through study and reflection about what is done, how it is done and why it is done, not only at the individual level but also a the organisational level. This will achieve a technical development that considers qualitative growth and not only quantitative, with which it will be possible to improve the conditions of human existence at a planetary level. According to Zamudio (2005), humanity faces the global problem of planning for

the proper growth in relation to the natural conditions of life, which have been damaged by industrial civilisation.

But, to date, environmental education as it has been "taught" has been focused only on the transmission of scientific knowledge about the environment, about material cycles, physical, chemical and biological principles and reactions, so that classes of environmental education are taught by chemists and biologists and deal with the causal relationships between events, and the technical means that are designed and empirically tested to produce changes in attitudes and habits at the level of the individual. As Morin (2002) wrote, human sciences make our analysis of the human condition weaker, because they are fragmented, divided and compartmentalised.

It follows that environmental education has not been directed to the real roots of the problem. That is to say, it has ignored the examination of the present paradigm, with its consumerist patterns and its spendthrift taxation underpinned by the neoliberal ideology of the global market. As Martínez (2007) puts it:

> A modern environmental education should describe a collective process of living in relation to the environment as an alternative way of life, a new cultural order that gives space to communitarian participation, to an equal society, to exploring new economic relations that respond to the need to recast the concept of environmental exploration as an opportunity to improve the quality of life, to re-evaluate the intangible, stop the exploitation of resources and dignify human life, repaying our debt to our ecosystems and to their natural cycle of regeneration in general.

Philosophy should lead individuals to develop a culture that promotes the construction and reconstruction of environmental thinking. Thinking environmentally would then be a task of thinking in a new way. We do not think so that we can live on the land, but it is the living, the form of living, that finds expression in our thinking (Eschenhagen, 2007).

Environmental Ethics

In our conduct as citizens, activities are carried out that can affect people in the near future, and also the future of many generations to come. Although many people have no knowledge of ethics, that cannot excuse them if they act without respect for nature. As Gadotti (2002) says, we cannot search, decide, break, or prefer, as though we were historical, transforming subjects, unless we first conceive ourselves as ethical beings.

Rodriguez (2007) argues that in the 1980s the idea originated that knowledge is not only an isolated trigger that produces adaptive environmental behavior, but that it has an ethical component, that is to say, it connects with attitudes, values and emotions. For this reason, environmental ethics is a process of becoming aware that has evolved through time and that consists, basically, in becoming more and more aware of the value of things in the world that surrounds us. From this perspective, individual consciousness begins to extend to include ever more individuals, as Gadotti (2002) indicates in the concept of tripolar formation first described by Rousseau; the other, things and our personal nature. We realise that there are many reasons why we must include animals and other forms of life on the planet if we

wish to be congruent in what we say, write and do. Leff (2002) considers that ethics is the way to recreate existential awareness, so that awareness once again becomes awareness, and reason reconnects with emotion and thought with sentiment.

Environmental ethics must extend the responsibilities of the present generation to construct a sustainable perspective, where the moral obligation must be to search for alternative paradigms for organising society and nature in the future. Leff (2002) indicates that environmental ethics give to account of the degree of relation between education, culture and society, to reinforce personal and institutional commitment to education, the protection and conservation of our natural heritage for present and future generations. Consolidation of environmental ethics is the foundation for the formation of values, attitudes and commitments of joint participation between educational authorities, teachers and student. According to Iglesias (2003), value is a social creation from which society emerges in all environments, resting on the protection of nature, respect, love and similar sentiments.

In addition, the environment is not merely what is natural. It includes, as Gutiérrez (2007) says, the social, economic, political, cultural, local and planetary, and aesthetic aspects, as well as research from a globalising, integrating point of view of the different aspects and the relationships between them.

Constructivist Learning in Environmental Education

Since the 1960s, there have been different initiatives to control and to reduce the environmental problems which each year have damaged the planet earth and therefore humanity, the flora and fauna. This was evident in the contamination of water, air and earth. In educational matters, educational models have been fundamental to sustainability and to applying learning processes where students obtain significant learning. As Ertmer and Newbt (1993) note, to the extent that we have moved from behaviourism through cognitivism to constructivism, the focus of instruction has moved from teaching to learning, from the passive transfer of facts and routines towards the active application of ideas to problems. As Espinoza (2003) indicates, the student will move from being a passive receiver to an active controller of his or her own process of learning.

ITESM (2005) states that with passive education, based on memory, many students today find difficulty reasoning in an effective way when they graduate from the school. This can be seen when the graduates enter employment, and in many cases, have difficulty with assuming responsibility appropriate to their position, even when it is associated with work corresponding to the area where there studies have been focused. It can also be seen that they have difficulty carrying out tasks in a collaborative way. As Iglesias (2003) observes, teachers work hard to transmit knowledge, culture and skills, but emphasise memorisation, partly because the curriculum is selected to promote it.

It is important to note that the application of constructivist learning in environmental education, and the constructivist approach of showing students how to construct knowledge, promotes collaboration with companions in the process of reviewing multiple perspectives that can be brought to bear on the solution of a problem. Gutíerrez, (2007) indicates that constructivism starts from the idea that the individual constructs his or her knowledge by means of sensory motor experiences,

and by means of mental operations, stimulated by interaction with the environment, society, and the culture.

It is crucial to bear in mind that, when education is implemented through a process of construction of knowledge, it must take into account social issues to achieve communitarian learning. Garcia and Cano (2006) note, people learn through social interaction, and what is learned is determined socially. People construct knowledge together, negotiating meaning and cooperating in the task of construction.

Currently, many educators claim that the process of education is constructivist, but the proper outcome requires more than just saying, and requires that they should also act on it. This is where the function of the directive management is important, so that teachers are directed to make the effort required by this difficult form of significant learning. Torres (2000) argues that teachers, in spite of the new theories, have themselves experienced only behavioural processes of education, and perhaps without realizing, they still reproduce the traditional scheme in their work.

The Nature of Environmental Problems in Environmental Education

Concerning environmental education in educational institutions from kindergarten to university, for teachers it is a challenge that society makes consistent efforts to reduce, to control and to improve environmental problems, on the assumption that it will achieve a better level of quality of life for people. Actually, this is the same approach that has produced the ecological problems and the environmental contamination. Leff (2000) stated that ecological catastrophes are not products of contemporary civilization.

But, it is also known that when people occupy a space, environmental problems grow exponentially. As Pujol (2000) puts it, consumption becomes an environmental problem that has social importance from the moment at which the individual and society have to consume in order to live. The relationship between society and nature are always a reflection of the economic organization and established policies of society and, consequently, environmental problems can only be explained with reference to those organizations. In this context Leff (2000) argues that the maximization of short term economic benefits has generated the globalisation of a set of effects: pollution of air, land, water, rivers, lakes and seas, environmental degradation by means of deforestation, soil erosion, loss of fertility, and waste of finite resources.

In this way, the solution rests with people, who make up this consumerist society. As Rivarosa and Perales (2006) observe, to solve the problems they must rely on everyday knowledge, together with scientific knowledge. They must rely on the former, because the problems arise from daily experience, and on the latter, because the problems are complex, which makes it necessary to resort to more sophisticated forms of knowledge. However, the traditional scientific knowledge is not sufficient to reduce or to eliminate the environmental problems. Pujol (2000) considers that the increase in consumption, generated by the industrialization and exacerbated by the consumer society, explain why the human species has stopped respecting the natural chain of events and the natural cycles of matter to establish, primarily, the economic chain. This presupposes an increase in the complexity of relations of consumption, creating serious imbalances.

Conclusions

The adaptation of ecology and environmental education from their establishment on our planet earth, have been surrounded by very good intentions on the part of the managers, researchers and senior teachers in education. In the governance of companies producing goods and services there have been established norms and/or laws that in many of the cases are not sufficient to prevent environmental pollution. For this reason it is necessary to investigate new strategies that allow for critical and reflective thought about our activities as human beings. These new strategies must bring about a sea change in thinking in the long term, producing a holistic educational process that integrates ecological, philosophical, political, economic and sociological knowledge, at the very least. This will bring about a modification in relationships of production, socio-economic structures and cultural patterns, that embraces the individual and the collective with the intention that present and future generations change the way they live, to encourage members of contemporary industrial society in a new, historic and global environmental context.

What is needed now is the construction of an alternative paradigm to the paradigm of traditional development, which supports improvement in the quality of life, a technical development with a view to qualitative growth and not only quantitative, which takes into account more than utility in the short term, that invests in educational processes to promote the generation of productive and sustainable services with the purpose of improving the human condition.

Therefore, the philosophy must bring people and society face the challenge of managing a culture that supports the construction and reconstruction of environmental thought. To think environmentally will then be to assume the task of a new type of thinking that harmonises all of nature (fauna, flora), including productive people and processes for a planet earth that is full environmental problems.

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OLGA NESSIPBAYEVA

THE COMPETENCIES OF THE MODERN TEACHER

Abstract

The principal aim of this study is to consider the competencies of the modern teacher. To understand 21st-century instructional skills, we researched the following issues: students' skills; levels of teachers' professional growth; teachers' pedagogical culture; pedagogical innovations, and 21st-century teaching competencies.

Keywords: teaching competencies, cultural competency, talent, innovation, creativity, critical thinking, problem solving

Inspire creativity, critical thinking,
collaboration and communication
so that students are ready for tomorrow's world.

We often hear about 21st-century learners and the knowledge and skills our students will need in the future. What about teachers? What instructional skills will 21st-century teachers need to prepare our students? How are they different from the skills teachers needed in the past?

In recent years, the quality of education has significantly changed. If, previously, the university's major aim was that of providing students with certain types of knowledge that they were expected to apply later, universities today focuses primarily on 'life skills'. Our aim is to teach students to obtain knowledge by themselves and to work in ways that enable them to come up with new ideas. Generating new ideas is a key tenet of modern society. We need professionals who are *culturally competent, talented, innovative and creative problem-solvers, skilled and critical thinkers*. New technologies give an opportunity to encourage *critical thinking*.

We must provide students with skills that will help them work collaboratively and sensitively in a team, become decision-makers, plan and manage their time effectively, listen to one another and choose the right communication strategy at the right time. Thereby, we have come to understand that, to meet these new teaching requirements, we need 21st-century skills.

Teacher competence

Before addressing the meaning of teacher competence, we must first establish the meaning of competence. Competency is a term used extensively by different people in different contexts; hence, it is defined in different ways. Teacher education and job performance are two contexts in which this term is used. Competencies are the requirements of a "competency-based" teacher education and include the **knowledge, skills and values** a teacher-trainee must demonstrate for successful completion of a teacher education programme (Houstan, 1987 cited in 1).

Some characteristics of a competency are as follows:

1. A competency consists of one or more skills whose mastery would enable the attainment of the competency.

2. A competency is linked to all three of the domains under which performance can be assessed: knowledge, skills and attitude.

3. Possessing a performance dimension, competencies are observable and demonstrable.

4. Since competencies are observable, they are also measurable. It is possible to assess a competency from a teacher's performance. Teaching competencies may require equal amounts of knowledge, skill and attitude, but some will not. Some competencies may involve more knowledge than skill or attitude, whereas, some competencies may be more skill or performance based.

Some scholars see "competence" as a combination of knowledge, skills and behavior used to improve performance, or as the state or quality of being adequately qualified and capable of performing a given role. The Occupational Competency movement initiated by David McClelland in the 1960s sought to move away from traditional attempts to describe competency in terms of knowledge, skills and attitudes and to focus instead on those specific values, traits, and motivations (i.e. relatively enduring characteristics of people) that are found to consistently distinguish outstanding from typical performance in a given job or role. The term "competence" first appeared in an article authored by Craig C. Lundberg in 1970 (cited in 2) titled "Planning the Executive Development Program", and then in David McClelland's seminal 1973 treatise entitled, "Testing for Competence Rather than for Intelligence" (cited in 2). The term has since been popularized by Richard Boyatzis and many others.

Student skills

The manifold complexities of today's society severely challenge individuals. What do these demands imply for those key competencies that individuals need to acquire? Defining such competencies can enable us to identify overarching goals for educational systems and lifelong learning and to evaluate the range of competencies for the 21st-century teacher. At first, we need to understand the *skills and sub-skills students require for successful communication and personal development, those that should assure them a competitive advantage in life:*

• *Thinking and Problem-Solving*
- thinking logically
- estimating and guessing
- turning problems into opportunities

• *Self Direction and Learning*
- developing memory
- being assertive
- making personal changes

• *Collaboration*
- persuading others
- working in a team
- discussing alternatives
- reaching compromises

• *Information and Research*
- understanding graphs
- taking notes on a text
- writing surveys
- reporting information
• *Organization and Planning*
- making plans
- managing time
- setting personal goals (cited in 3).

Teaching competencies

A competency is more than just knowledge and skills; it involves the ability to meet complex demands by drawing on and mobilizing psychosocial resources (including skills and attitudes) in a particular context. Competency is essential to an educator's pursuit of excellence.

Teachers need a wide range of competencies in order to face the complex challenges of today's world. Teaching competency is an inherent element of an effective training process, one that aspires to contribute to the welfare of a particular country or the world, itself.

The central figures in the educational process are teachers. The success of training and education depends on their preparation, erudition and performance quality.

The teaching skills and life-long learning competencies of professional teachers comprise the following:

to perform complex pedagogical duties;

to be well-spoken, in good mental and physical health, stable and tolerant;

to have a propensity to work with the younger generation, good communicative and observational skills, tact, a vivid imagination, and leadership (Shmelev, 2002).

During their professional careers, teachers pass through the following *levels of professional growth* to achieve the acme of professional competency.

1st level: *pedagogical ability* – characterized by detailed knowledge of the subject;

2nd level: *pedagogical skill* – perfected teaching skill;

3rd level: *pedagogical creativity* – marked by implementation of new methods and techniques into educational activities;

4th level: *pedagogical innovation* – distinguished by the incorporation of essentially new, progressive theoretical ideas, principles and methods of training and education (Buharkova, Gorshkova, 2007).

Schools of education have acknowledged the urgency to develop culturally competent teachers. **Pedagogical culture** is, therefore, an integral part of a competent teacher. Pedagogical culture consists of three components:

an axiological component, meaning teacher acceptance of the values of pedagogical work;

a technological component, which facilitates solving different pedagogical tasks;

a heuristic component, which entails setting goals, planning, analyzing and self-critiquing; this is the creative part of pedagogical activity (Ivanitsky, 1998).

Pedagogical innovations

Educational innovation has drawn increasing attention around the world, and many countries have already embarked on educational reforms that aim to change both the goals and practices of education. Expectations that such innovations can be leveraged or supported by incorporating ICT (Information and Communication Technologies) into the learning and teaching process are widespread. Such innovations are fundamentally changing students' learning experiences.

Innovation alters the pedagogical system, improving the teaching process and its results. Among the aims of innovation are increased motivation in teaching and educational activity, an increased volume of material studied per lesson, accelerated training, and more effective time management.

The introduction of more progressive methods, the use of active teaching forms, and new training technologies are regular spheres of innovation.

Genuine innovations emerge from new knowledge of the processes of human development, providing new theoretical approaches and practical technologies for achieving optimal results. Pedagogical innovation demands the replacement of educational paradigms.

Another important component for the competent teacher is pedagogical experience. *Advanced pedagogical experience* can be transferred and passed on to others, as well as reproduced in training techniques and methods so as to be used by fellow teachers, providing high results without additional time expenditure (Kan-Kalik, Nikandrov, 1990).

21st-century competencies have been defined as the knowledge, skills and attitudes necessary to be competitive in the 21st century workforce. Teacher preparation and professional development should be reworked to incorporate training in teaching key competencies. The 21st-century teacher needs to know how to provide technologically supported learning opportunities for students and know how technology can support student learning.

21st-century teaching competencies

1. Teachers demonstrate leadership
  a. *Teachers lead in the classroom by:*
     - evaluating student progress using a variety of assessment-data measuring goals;
     - drawing on appropriate data to develop classroom and instructional plans;
     - maintaining a safe and orderly classroom that facilitates student learning; and
     - positive management of student behavior, effective communication to defuse and deescalate disruptive or dangerous behavior, and safe and appropriate seclusion and restraint techniques.
  b. *Teachers demonstrate leadership in the school by:*
     - engaging in collaborative and collegial professional learning activities;
     - identifying the characteristics or critical elements of a school improvement plan; and
     - displaying an ability to use appropriate data to identify areas of need that should be addressed in a school improvement plan.

   c.   *Teachers lead the teaching profession by:*
- participating in professional development and growth activities; and
- developing professional relationships and networks.

   d.   *Teachers advocate for schools and students by:*
- implementing and adhering to policies and practices positively affecting students' learning.

   e.   *Teachers demonstrate high ethical standards.*

2. Teachers establish a respectful environment for a diverse population of students

   a.   *Teachers provide an environment in which each child has a positive, nurturing relationship with caring adults by:*
- maintaining a positive and nurturing learning environment.

   b.   *Teachers embrace diversity in the school community and in the world by:*
- using materials or lessons that counteract stereotypes and acknowledge the contributions of all cultures;
- incorporating different points of view in instruction; and
- understanding the influence of diversity and planning instruction accordingly.

   c.   *Teachers treat students as individuals by:*
- maintaining a learning environment that conveys high expectations of every student.

   d.   *Teachers adapt their teaching for the benefit of students with special needs by:*
- cooperating with specialists and using resources to support the special learning needs of all students; and
- using research-verified strategies to provide effective learning activities for students with special needs.

   e.   *Teachers work collaboratively with families of students and other significant adults by:*
- communicating and collaborating with the home and community for the benefit of students.

3. Teachers know the content they teach

   a.   *Teachers develop and apply lessons based on an effective course of study by:*
- integrating effective literacy instruction throughout the curriculum and across content areas to enhance student learning.

   b.   *Teachers honor the content appropriate to their teaching specialty by:*
- demonstrating an appropriate level of content knowledge in their specialty; and
- encouraging students to investigate the content area to expand their knowledge and satisfy their natural curiosity.

   c.   *Teachers show they recognize the interconnectedness of content areas/discipline by:*
- demonstrating a knowledge of their subject by relating it to other disciplines; and
- relating global awareness of the subject.

   d.   *Teachers make their instructions relevant to students by:*
- integrating 21st-century skills and content in instruction.

4. Teachers facilitate learning for their students
    a.   *Teachers show they know the ways in which learning takes place and the appropriate levels of intellectual, physical, social, and emotional development of their students by:*
- identifying developmental levels of individual students and planning instruction accordingly; and
- assessing and using those resources needed to address the strengths and weaknesses of students.

    b.   *Teachers plan instruction appropriate to their students by:*
- collaborating with colleagues to monitor student performance and making instruction responsive to cultural differences and individual learning needs.

    c.   *Teachers show their acumen and versatility by:*
- using a variety of methods and materials suited to the needs of all students.

    d. *Teachers display their awareness of technology's potential to enhance learning by:*
- integrating technology into their instruction to maximize student learning.

    e.   *Teachers help students grow as thinking individuals by:*
- integrating specific instruction that helps students develop the ability to apply processes and strategies for critical thinking and problem solving.

    f.   *Teachers help students to work in teams and develop leadership qualities by:*
- organizing learning teams for the purpose of developing cooperation and student leadership.

    g.   *Teachers reach their students best by:*
- using a variety of methods to communicate effectively with all pupils; and
- consistently encouraging and supporting students to articulate thoughts and ideas clearly and effectively.

    h.   *Teachers best assess what students have learned by:*
- using multiple indicators, both formative and summative, to monitor and evaluate student progress and to inform instruction; and
- providing evidence that students are attaining 21st-century knowledge, skills and dispositions.

5. Teachers reflect on their practice
    a.   *Teachers analyze student learning by:*
- using data to provide ideas about what can be done to improve student learning.

    b.   *Teachers link professional growth to their professional goals by:*
- participating in recommended activities for professional learning and development.

    c.   *Teachers function effectively in a complex, dynamic environment by:*
- using a variety of research-verified approaches to improve teaching and learning (cited in 8).

Conclusion

Ideally, then, educators should demonstrate the following competencies:

1) *effective classroom management,* maximizing efficiency, maintaining discipline and morale, promoting teamwork, planning, communicating, focusing on results, evaluating progress, and making constant adjustments. A range of strategies should be employed to promote positive relationships, cooperation, and purposeful learning. Organizing, assigning, and managing time, space and activities should ensure the active and equitable engagement of students in productive tasks.

2) *effective teaching practices,* representing differing viewpoints, theories, "ways of knowing" and methods of inquiry in the teaching of subject matter concepts. Multiple teaching and learning strategies should help engage students in active learning opportunities that promote the development of critical thinking, problem solving, and performance capabilities while helping them assume responsibility for identifying and using learning resources.

3) *effective assessment,* incorporating formal tests; responses to quizzes; evaluation of classroom assignments, student performances and projects, and standardized achievement tests to understand what students have learned. Assessment strategies should be developed that involve learners in self-assessment activities to help them become aware of their strengths and needs and encourage them to set personal goals for learning.

4) *technology skills,* knowing when and how to use current educational technology, as well as the most appropriate type and level of technology to maximize student learning.

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PRE-SERVICE TEACHER ACTION RESEARCH: CONCEPT, INTERNATIONAL TRENDS AND IMPLICATIONS FOR TEACHER EDUCATION IN TURKEY

Abstract

Action research is increasingly recognized as an important component in initial teacher education programs in different countries around the world. Either as an inquiry project conducted during a field experience, or as a research-inclusive course, action research processes are introduced to student teachers during their study period in order to support the development of reflective teachers. The present contribution briefly examines some pre-service teacher action research practices in different countries, identifies similarities and differences and discusses implications for teacher education in Turkey.

> *He who can no longer pause to wonder and stand rapt in awe, is as good as dead;*
> *his eyes are closed.*
> *Albert Einstein*

Introduction

In recent years, action research as a means of providing reflective practice and educational change has become a major component in teacher preparation programs around the world. This "teacher as researcher" movement has developed particularly in contexts such as the United States and Australia, where the professional identity and practices of teachers are quite developed (Adler, 1997). It is noteworthy that action research in initial teacher education does not aim to transform teachers into academic researchers, but rather to educate autonomous and reflective teachers (Choi, 2011; Krokfors et al., 2011). Action research is a tool that enables teachers to constantly improve their teaching practices and make their work more professional. In other words, it is a means to empower student teachers to reflect on their own professional experience in the light of a scientifically based discourse, as it was described ideally with the model "reflective practitioner" by Donald Schön (1983).

Regarded as a unique genre within the action research tradition, the concept of pre-service teacher action research is defined by Phillips and Carr (2010) as follows:

> Action research for preservice teachers is a process of learning with community to think and act critically, to recognize and negotiate political systems, and to focus passion growing in one's identity as a teacher. Such a process evolves out of a desire to become a caring, intelligent, transformative educator and includes honing the art and science of planning, assessment, and a critical reflective practice… The result of action research for preservice teachers is the beginning of a journey in becoming a teacher living in the teaching/research life to simultaneously improve teaching practice, student outcomes, and systems of schooling to be more just and equitable for all children and adolescents (p.17).

Educational researchers have identified several reasons for introducing action research to pre-service teachers:

- Action research is important as a tool for bringing theory and practice together, by bridging the gap between school and the world outside school. It is an important strategy for linking what students learn about teaching from their school experiences with what they learn from university experiences (Ax, Ponte and Brouwer, 2008; Phillips and Carr, 2010; Ponte, Beijard and Ax, 2004). According to the model of the "reflective practitioner", action research aims at integrating scientific knowledge and procedural knowledge as two integral parts of professionalism: Whereas scientific knowledge can be seen as "knowledge about practice" (Messner and Reusser, 2000), procedural knowledge refers to "knowledge in practice" (ibid). Action research combines "knowledge about practice" and "knowledge in practice" towards "knowledge for practice" and contributes, thereby, to solve one of the key challenges in teacher education.
- In line with the current constructivist thought on teacher education, action research can enable student teachers to actively pursue their own questions, build upon their own knowledge base, and interact within a social environment as reflective practitioners (Rock and Levin, 2002; Ross, 1987).
- By allowing student teachers to critically reflect on their process of becoming a teacher, action research helps them develop their voices and perspectives about teaching. Through action research, student teachers are given space to tell their own stories and create their own meaning in their own voice (Phillips and Carr, 2009; Phillips and Carr, 2010; Price, 2001).
- The added responsibility and opportunity for initiative that action research provides bring the experience of being a real teacher forward into the pre-service year. In other words, it makes the process of learning to become a professional educator a more conscious effort (Kosnik and Beck, 2000).
- Teachers today deal with both academic and emotional domains and feel not only academically but also socially responsible for their students. In addition, they are expected to teach heterogeneous, inclusive classes, with higher responsibility towards parents. They are also expected to be engaged in research and seek professional development. Thus, action research can be an effective way to prepare student teachers for these multiple roles and conflicting expectations they may face in today's world (Kosnik and Beck, 2000; Phillips and Carr, 2009).
- Action research is also an important qualification for lifelong learning in the workplace after university education (Ponte, Beijard and Ax, 2004).

Method: Comparative Education

Comparative education analyses and presents the standards used in educational practices of other countries. This analysis may help policymakers and educational leaders make the right decisions for their country (Erdogan, 1995). A comparative perspective is a useful tool for a better understanding of the educational process in general and of one's own system in particular. According to Grant (2000), "a comparative perspective can get under the skin of other systems of education; it can try to understand how they relate to our own problems, and how and why they differ

from our own" (p.310). Similarly, Bray (2004) explains that looking outwards is surely useful: "An alternative way to promote objective understanding of one's own society, however, is first to look outwards and then to look back" (p.252).

However, the dangers of imitating others' practices without considering the realities of one's own country should not be neglected (Demirel, 2000). Great care is needed here since the other countries' practices may be misinterpreted or they may be too closely bound up with their specific contexts to be applicable anywhere else. Therefore, it is important for researchers to test the feasibility of the transfer of ideas in question and then to analyze what happens as the stages of its adoption evolve (Grant, 2000; Phillips, 2006).

The present study analyses some good pre-service teacher action research practices around the world. In line with the structure for comparative inquiry proposed by Phillips (2006), educational phenomena in different countries are first described. The next stage comprises isolating differences and similarities through direct comparison of the phenomena. Lastly, the implications of such differences and similarities as well as the applicability of the findings are discussed.

Examples of good practices in different contexts

The United States

The concept of developing teachers as active researchers of their own practice is integrated into all 5-year teacher education programs at the first selected case in the United States. All student teachers complete a 1-year internship after fulfilling requirements for a bachelor's degree. They earn their graduate credit during the internship and associated coursework, including the completion of an action research project in the primary placement of the internship year. Action research, with the focus on the "action" part mostly, is regarded as a practical tool for addressing real problems in real schools. Throughout the year, their instructors teach them how to do and write up each step of the project, from the review of the literature, and methods and procedures sections up to data analysis, conclusions and implications. At the end of the school year, action research projects are shared with peers, school administrators, and university faculty at a presentation event (in Hatch, Greer and Baile, 2006).

In the second selected case in the United States, a cohort of secondary student teachers were introduced and instructed in the process and value of conducting action research while completing their field experience. Throughout this federally sponsored project, the student teachers organized, prepared, presented and evaluated their research activities. On the whole, the students found their experiences both affirming and insightful, stating that they acquired needful and beneficial skills and abilities for reflection (in Hansen and Nalder-Godfrey, 2004).

Australia

In the selected case in Australia, a formal compulsory research oriented unit – *Research Skills for Beginning Teachers* – was introduced in the final year of the study period in order to help student teachers develop their professional research awareness in their school community. Based on the idea that the pre-service teacher education program is the best time to commerce the development of teachers' understanding of action research, this unit aimed to help students acquire classroom

research skills. It also equipped them with the ability to collaborate with colleagues on school-based research activities. The unit provided opportunities for students to work collaboratively in analyzing sets of outcomes, conducting interviews, systematically observing a classroom situation, conducting focus group discussions, conducting surveys and reporting the results in qualitative and quantitative forms (in Gray and Campbell-Evans, 2002).

Israel

In the selected case in Israel, a college of education, senior student teachers are engaged in an action research project as a compulsory assignment in the course *Teacher as Researcher*. By linking theory to practice, the course aims to support the students in crossing the bridge from being students to becoming teachers. The students conduct action research projects on a self-regulated authentic professional problem, derived from their personal teaching experience. At the end of the school year, an academic conference is held to give the students the opportunity to share their personal learning process and insights with peers, other students and teachers of the program (in Smith and Sela, 2005).

Lessons learned from the good practices

This brief look at the implementation of action research as an element of teacher education programs in different contexts suggests that the notion of 'teacher as researcher' and 'producer of knowledge' is of central importance. Reflection, integration of theoretical and practical knowledge, and pedagogical thinking seem to be at the heart of these practices. In the first American example, the students spend a whole year conducting their action research projects after fulfilling requirements for a bachelor's degree. This 5-year model provides time and opportunity for building action research processes, which is not always available in more traditional program organizations.

The initial teacher education programs at the Australian university and the college of education in Israel offer compulsory courses on action research in the graduate year of the program. The student teachers are required to do full action research projects within the framework of these courses which emphasize the "action" part of action research. Since the aim is to encourage the students to reflect on their practice, the projects are expected to focus on inquiry skills, rather than research skills (statistics, interview, observation etc.). It is also noteworthy that the insights and results are generally shared with others through a small conference, which gives the message that the university values the impact of teacher action research results (Choi, 2011).

Implications for teacher education in Turkey

Despite some positive changes made by some education faculties in their curricula (see Kuzu, 2009) or some teacher educators' individual attempts to integrate action research into the content of courses, it is still hard to claim that action research has become a major component of teacher preparation programs in Turkey. As a result of the globalization process and Turkey's EU accession period, the Higher Education Council has made some changes in the curricula of education faculties. The idea behind these attempts was to change the curriculum from a

teacher-centred didactic model to a student centred constructivist model (Bulut, 2007; European Commission Report, 2010).

However, it is hardly possible to say that the sorry state of teacher education in Turkey has changed considerably since then. Student teachers still spend hours learning about their subject and general education, but little time is spent on actual teaching. The courses offered to student teachers focus mostly on theoretical knowledge and fail to contribute to their critical thinking skills (Korkmaz, 2009). Besides, hardly any attention is given to the research skills that will enable them to improve their teaching practices in the classroom. Education faculties offer a two-credit, one-term course entitled *Scientific Research Methods*, which is too broad in content and insufficient for setting the stage for an action research course that might be taken by student teachers later in their study period. There appears to be no single course on action research which will certainly help student teachers bridge the gap between theory and practice in instructional endeavours.

Student teachers in Turkey start practice teaching in their graduate year which consists of two semesters. During the first semester they visit the same school and observe the same classroom atmosphere for several months. They do not have the chance to observe pupils of different ages or the instructional processes in different classes and grades. In the second semester, they do three or four micro lessons (10 - 15 minutes of teaching) within the term. As Altan (1998) suggests, the purpose of these courses is rather "outmoded" and "hazy". Therefore, there is little opportunity for them to put their knowledge into practice or do action research projects during a field experience.

Even if student teachers are equipped with the necessary means of doing action research, it is unrealistic to expect that they will prioritize their teacher-researcher role. The largely exam-oriented nature of the present education system in Turkey creates a serious challenge to the implementation of action research practices by teachers. Both state and private schools require teachers to prepare students for the national placement tests. This requirement forces teachers to focus mainly on testing strategies and changes the way they see education.

Besides, the realities of being a student teacher in Turkey do force them to deal primarily with the problem of KPSS, a qualification exam that they have to pass in order to become teachers at public schools. Preparation for this comprehensive test that includes questions from various subject branches takes much of their time and energy, constituting a serious stress factor for especially senior student teachers, as supported by the research literature (see Gundogdu, Cimen and Turan, 2008; Kızılaslan, 2011).

Moreover, young teachers who become successful in this qualification exam have to wait for years to be assigned by the Ministry of National Education, which causes serious demoralization. And when they are assigned, they are generally sent to the rural parts of the country where they have to complete their compulsory service. In these regions, devoted young teachers are expected to overcome serious problems resulting from poor physical conditions and/or security problems. To illustrate, in September 2011, 8 teachers in two separate provinces in south-eastern Turkey were kidnapped by the PKK. Also, in October 2011, during the 7.2 magnitude earthquake which hit the eastern part of the country, a total of 75 young

teachers were killed mostly because they had not been provided with appropriate accommodation conditions.

Taking all these contextual factors into consideration in the country, it is possible to claim that the crafting of an action research component in the curriculum requires special attention. Such an endeavour needs to consider such situational factors as the insecurities of prospective teachers, the realities of the country and of the teaching profession. It is important that an action research course or project offers worthwhile experiences for student teachers, providing a framework that will help them evaluate and improve their teaching practices in relation to the everyday realities of students and teachers in the Turkish context.

In conclusion, it is noteworthy that action research in teacher education is embedded in a learning and teaching culture that enables active, mindful, intentional, critical thinking (in the sense of constructivist approaches) and that the "tool" of action research itself might perhaps not develop its potential if it is not connective with the prevailing learning-teaching culture. A successful implementation requires a stronger awareness of the contextual conditions and a desire to overcome serious obstacles caused by the social, political and cultural constraints.

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Part 3

Education Policy, Reforms and School Leadership

GILLIAN L. S. HILTON

CHANGING POLICIES CHANGING TIMES: INITIATIVES IN TEACHER EDUCATION IN ENGLAND

Abstract

For many years now in England the ways to train for the profession of teaching have been varied, but most teachers have been prepared through partnerships between universities and schools. Now, proposals by the Secretary of State for Education are attempting to virtually remove teacher education from universities giving it into the control of schools, based on the belief that teaching is merely a 'craft' not an academic discipline. The resistance to this idea from the majority of the profession is huge but will the practitioners be heard?

Key words: Teacher education, School based programmes, Teacher education policy, Teacher educators

Introduction

Olssen et al (2004: 2-3) state that

> There was a time when educational policy as policy was taken for granted… Clearly this is no longer the case. Today educational polices are the focus of considerable controversy and public contestation… Educational policy-making has become highly politicised.

In the present context of Europe and even in the global situation, education is at the forefront of change and is often seen as the cause of any country's problems and failings. Politicians at European and country level produce reports, call for change and heap blame upon those responsible for the education of our young people. The aftermath of the riots in England in the summer of 2011 resulted in a call to change education and claims that too many schools lacked discipline. This is despite Ofsted reporting positively on the improvement of discipline standards in schools in recent years. An interesting response from Kelly, Editor of the Times Educational Supplement (the main education paper for teachers in England) claimed that 'when teachers go away for a long break leaving only politicians, parents and police in control – society collapses' (Kelly, 2011:4). This response may be somewhat extreme, but it mirrors the frustrations of those in the teaching profession at the habit of our political leaders of too easily blaming educators for the ills of society, with little recourse to research or even debate.

Good policy stems from good research, produced by independent researchers who do not set out to prove what they believe as being true. Gorard (2010) criticises much educational research in the UK as being flawed and lacking in rigour. Unfortunately therefore, if this claim is to be believed, far too often our politicians base their policies on flawed research, the opinions of like-minded 'experts' and even on ideas taken out of context from another society. Good examples of this are the former Labour government's obsession with the success of Finish schools in the PISA league tables, resulting in a scramble to bring all teachers in England to Master's level qualifications and the present coalition's determination to open Free Schools, based on the USA Charter schools and the Swedish model, which has not been particularly successful, when the Dutch model was worth examining.

Teacher Education Policy in England

Policy developments in recent years in the UK, with regard to education, have changed the picture from one where the individual was shielded as far as possible from market forces (Gewirtz, 2002) to a standards based, accountable, market led view (Tomlinson, 2001), stressing competition rather than co-operation. The school league tables make public the test achievements of schools in national assessments, allowing little for differences in intake or social makeup of the student body, whilst Ofsted reports are made public on their website. Bell and Stevenson (2006) point out, that institutions do not implement policies without resistance, but rather change and adapt them subtly or even challenge them outright. This they believe tends to occur where the values expressed in the policy are at odds with the values of the institutions and the staff involved. Gewirtz and Ball (2000) however, stress the compulsion of the modern education manager to perform in the market, with institutions forced to stand out from their rivals by offering something different and special to add value. The previous Labour government continued the market forces approach to education favoured by earlier Conservative administrations, but according to Furlong (2005) changed the idea of how to develop the teacher as a professional from one where this was left to the individual via study during initial teacher training and experience, to one where the state determined what were the effective ways to teach, to learn and to assess. Added to this he believed was a removal of professional development away from universities to schools resulting in a lowering of the importance of the development of a professional and of initial teacher education itself.

Research (Reynolds et al., 2002) into the effectiveness of schools and teachers has demonstrated that the teacher is at the heart of improving student performance and many observers believe that the obsession of politicians with standards in tests such as PISA SATs and GCSEs has eroded teachers' professionalism as there is so much imposed outside control. Whether this has resulted in any real improvements in achievement over the last few years is questionable. Little consultation occurs with those really involved, the teachers, teacher educators or even the students, when strong ideologies and media misrepresentations take over.

Those in the teacher education profession have, over the last years, done their best to accommodate the ever changing regulations, including the standards required to receive qualified teacher status and had hoped with the advent of a new government in 2010 for less interference and a little peace to consolidate the

outstanding and good training about which Ofsted was reporting. It was not to be. Once again the Ministry had a name change and new Secretary of State for Education produced, after six months of the coalition coming to power, his White Paper '*The Importance of Teaching*' (DfE, 2010).

Secretary of State Gove's recent proposal regarding the training of teachers given in a speech to the National College in June 2010 put forward the views that teaching training should be moved 'out of college into the classroom' and that teaching is not an academic study but a craft that can best be learnt 'as an apprentice observing a master craftsman or woman' (TES, 2010). In addition he intends to raise the entry standard to the profession only allowing those with higher level degree classifications to be admitted and that all prospective teachers pass a maths and English entry test before starting a course. In addition there is to be an expansion of *Teach First*, the scheme that involves a six week intensive preparation period for high flying graduates from top universities, who after this quick preparation are deployed and paid as untrained teachers in challenging schools. The ideology behind these changes is expressed as being an attempt to free schools from the control of local government education departments and also central government, removing the mesh of regulations introduced under the previous Labour administration. The main question which arises from this proposal is; who will be responsible for developing the professional aspects of a teacher's knowledge? This has in the past been the responsibility in the main of university education departments, with even the school based routes to teaching (there are a wide variety of these in England) using expertise from university staff to provide theoretical backgrounds on areas such as learning and teaching, behaviour management and professional responsibilities in addition to subject knowledge studies. Understandably these proposals have received some very negative responses from teachers, unions and universities. One teacher writing to the TES online forum said

> I'm hugely insulted by this. I don't trim hair cut wood or knit! I use an array of methods to accelerate students' learning whilst conducting research into new methods, before disseminating them to the community (TES, 2010).

Moving training almost completely into schools and taking power and money from university education departments to create a learn at the feet of the master apprentice approach, has followed what Reid (2010) describes as the normal approach for policy reform, by asking for consultation on the details, but not on the conceptualisation of the ideas put forward. This approach is directly opposed to the ideas of authors such as Fullan (1999, 2001, 2003) who points to the need to involve those implementing change from the outset if the initiative is to be successful. Is then the dominant model of policy, one imposed from above, out of date and unworkable in modern society where rapidly changing contexts may render universality as out-dated and inefficient? Following the status quo will not give the innovative, theoretical basis for action so needed by teachers who are preparing children for an uncertain future. We need to change to progress, but then the questions need to be asked; is teaching something that can be learned at the feet of a Master with little recourse to understanding of why some ideas succeed and others do not and is it possible to use policies successful in one context in another with little adaptation? Approaches that work in an inner city school with many children who are from ethnic minorities, with parents whose command of the English

language is limited, may not be suited to middle class children coming from homes where high aspirations are the norm and books and technological equipment are readily available. So can we learn from one teacher in one school how to approach all children? Is there something more than this to preparing teachers? As Evans et al (2011) profess, teachers in schools do have professional knowledge developed over years, but some are working in schools where theory is not valued, research is not consulted and professional discourse on theoretical ideas does not occur. With the day to day challenges of teaching how much attention will be given to the underpinning of actions by knowledge gained from the study of theory and research findings? Furlong's (1990) research with trainees suggests that they do not reject theory, but the only place where this kind of discussion takes place is in university based training.

Other complainants are the universities who see their role in teacher education reduced to a minimum and with it the valuable funding they receive (though some of this is passed onto their partner schools who undertake practice supervision and mentoring). Instead, they will be paid by schools to add whatever theoretical element schools want for the training they are providing. This, it is believed by some of the older universities, will lead to the closure of many education departments in universities; with the subsequent reduction of research activity, as employing lecturers to work in schools on a limited basis will not be cost effective. It will also result in redundancy for many teacher educators, very costly for universities already in severe financial straits with government funding changes. According to Schultz (2011:34) there is a mistaken belief that institutions of Higher Education are not in favour of practice preferring to adhere to a theoretical approach. He refutes this idea insisting that teacher education professionals see theory and practice as matching sides of a whole, because excellence in pedagogy has to be firmly based in theory.

Cunnane (2010) reported in Times Higher Education that The University Council for the Education of Teachers (UCET) has also expressed fears that schools will not be able to cope with producing the numbers of teachers required as the time needed to undertake the task effectively would be burdensome to schools, especially smaller ones and adversely affect quality. They were also concerned with a possible reduction in the quality of the teachers produced if training was put into schools with only minimal input from universities.

Conclusion

To produce a professional teacher takes time and can only be achieved if that professionalism is founded on a good understanding of educational theory, not merely subject knowledge and from then the prospective teacher can also learn how to apply that theory in practice situations. Many teachers and teacher educators in England believe that the proposed policy changes are 'based on a simplistic and narrow view of the role of the school and teaching resulting from politicians' memories of their experiences in what was almost certainly an elitist school experience' (Evans et al., 2011:3). Training our teachers needs the input of theory from those who have studied and critically analysed it in depth as well as practice of how to apply that theory and see others applying it, followed by critical analysis of and reflection on its worth in the current situation. Without this our teacher training will simply not be good enough. It is essential too that students experience a variety

of practice conditions in different schools and these proposals seem to ignore this need. Politicians therefore, whose time span in a role can be cut short by an election, or more often by promotion or demotion, or a cabinet reshuffle must realise that the timespan of their policies is much more than their stay in the power base and that poor policy decisions can affect the education of a generation of children long after they have been removed from office and have been forgotten about. Kozminsky (2011:7) insists that any policy maker who wants a successful implementation of their proposed policy change needs to base that policy on ideas and 'processes that engage teachers and teacher educators'. Without this she believes that the professionals will feel that their identity has been challenged and fail to support proposed changes. Many within the teacher education profession in England agree with this but the reforms are moving forward with little response to our concerns. This raises another question: is the reason our opinions are constantly ignored by politicians caused by our constant and long standing compliance to their whims? Teacher educators await the future with disappointment and concern that yet again we are seen as the problem, not part of the solution in improving standards for our teachers.

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NICHOLAS SUN-KEUNG PANG & JOHN PISAPIA

DEALING WITH CHANGE IN HONG KONG SCHOOLS USING STRATEGIC THINKING SKILLS

Acknowledgement

Abstract

This paper reports an investigation into the strategic thinking skills of school leaders in Hong Kong. By adapting the Strategic Thinking Questionnaire in the school context and based on data self-reported from 543 Hong Kong school leaders, three cognitive capabilities with strategic thinking were identified: reflection, systems thinking and reframing. The study determined that (a) the use of the strategic thinking could distinguish between more and less successful leaders, (b) school leaders' understandings of system dynamics had significant effects leadership effectiveness, and (c) while systems thinking explained much of the variance in the success variable, there was a cumulative impact of the use of all three capabilities. These findings have implications for training, professional development, and selection of aspiring leaders.

Key words: Strategic leadership, educational administration, organizational change, thinking skills, Hong Kong

Introduction

Hong Kong, like many societies, has been undertaking a major restructuring of its school systems (Education Commission, 1999, 2000). Ever since the 1982 report: A Perspective on Education in Hong Kong, proposed by an international panel of experts, which gave a very detailed systematic analysis of the strengths and limitations of the Hong Kong education system, educational reforms in Hong Kong have risen to prominence. The then Education Department (now, the Education and Manpower Bureau) has taken an active role in its follow-up work. With the publication of the seven successive Education Commission Reports (Education Commission, 1984, 1986, 1988, 1990, 1992, 1996, 1997), The School Management Initiative (Education and Manpower Branch & Education Department, 1991) and Information Technology for Learning in a New Era (Education and Manpower Bureau, 1998), the city has experienced a pervasive and influential transformation of its education system.

The school reform movement began by remedying the inadequacies of teacher training (Education Commission, 1984). It was followed by the School Management Initiative requiring schools to enhance their practice of delegation, empowerment, teacher autonomy, accountability, and parental involvement (Education and Manpower Branch & Education Department, 1991). The upgrading of 35% of

primary school teachers' degrees, to the level of bachelor or higher, immediately followed the initiative (Education Commission, 1992). Five years later, the achievement of high quality education through schools' self-evaluations and quality assurance inspections was highlighted (Education Commission, 1997).

Complexity created by these waves of change requires that leaders act and think strategically. Change provides opportunities, growth, innovation, as well as threats, disorientation, and upheaval. Whether a leader is able to appreciate change depends very much on their attitude in perceiving it. As far as educational leaders are concerned, their abilities to deal with change lies entirely in how they think and how they help their members prepare themselves for continuous professional development and school improvement.

Theoretical Framework

The changes confronting Hong Kong mean that educational leaders must possess, or add, the capability to think strategically and to facilitate the on-going process of change. Cognition is the way thinking is accomplished as individuals acquire knowledge, manipulate ideas, and process new information and beliefs. We are not alone in this assumption. Argyris and Schön (1978) were leaders in the development of reflection as an important cognitive skill needed by leaders trying to make sense of their ever changing worlds. Peter Senge (1990) in his seminal work, *The Fifth Discipline*, advised government, corporate, and educational leaders that the new challenges of globalization demand them to practice systems thinking and to transform their organizations quickly. Pisapia (2009) and Pisapia and Lin (2011) joined the work of Senge and Argyris and Schön adding the cognitive process of reframing to the mental skills needed to practice strategic thinking. They hypothesized that successful and less successful leaders use these three cognitive processes (reflection, systems thinking and reframing) differently, especially in times of complexity. When developed, these capabilities help leaders make sense of complexities facing the organization and enable them to identify, predict, respond, and adapt to non-linear change opportunities and challenges.

The theoretical framework guiding this study builds on the earlier work of Argyris, Schön, Senge, and Pisapia. Regardless of the architecture presumed to underlie human cognition, knowledge must be retrieved, activated, and/or recreated to influence actions and perceptions. We assume that three cognitive processes of systems thinking, reframing and reflection will be potential distinguishers between successful and less successful leaders in Hong Kong. It is apparent from the descriptions found in the paragraphs that follow that the three processes complement each other. For example, the role of context, mental models, and framing is evident in each process. However, there is enough dissimilarity to warrant individual descriptions. Leaders use information gathered through systems thinking and reframing during the process of reflection to make sense out of situations. These three processes assist leaders in (a) reframing situations so they become clearer and more understandable; (b) reflecting and developing theories of practice which guide actions; and (c) thinking in more holistic ways. They also aid leaders in seeing events and problems in terms of concepts, which are useful ways of thinking effectively about problems.

In summary, systems thinking, reframing and reflection, in all of their forms, are important cognitive skills for leaders to possess. The perspective one takes away from this literature is that there is no one best way to create corrective or unique solutions. Each situation presents different motives, problems, and preferred outcomes that result in different choice of strategies. The job of the leader is to select the process that fits the circumstances. Systems thinking gives the leader the ability to see patterns and interrelationships. Reframing provides the advantage of multiple perspectives. Reflection gives the leader the ability to see why certain choices work and others do not, which is tied directly to the uniqueness of each choice situation. We believe that leaders who possess the ability to engage in these cognitive processes will be more effective than those who possess these abilities in lesser quantities. The use of these processes enables the leader to build a reservoir of insights and intuitions, which can be called upon when confronted with ambiguity, complexity, and dilemmas.

Aims of the Study

This research adapts Pisapia's (2009) study of the strategic thinking capabilities of leaders in the United States and development of the Strategic Thinking Questionnaire (STQ) to the educational context of Hong Kong (Pisapia *et al.,* 2009). This research seeks to determine if there is a relationship between the cognitive capabilities of educational leaders in Hong Kong and their success. The study was guided by three research questions:
1. What are the relationships among the three cognitive capabilities for strategic leadership in Hong Kong schools?
2. Is there a relationship between Hong Kong school leaders understanding of system dynamics and their use of these cognitive capabilities?
3. Is there a relationship between Hong Kong school leaders' use of these cognitive capabilities and their effectiveness?

Methodology

This study adapted the *Strategic Thinking Questionnaire (STQ)* developed in the U.S. context by Pisapia (2009) to that in Hong Kong. The STQ was developed to measure the three cognitive capabilities that strengthen strategic thinking: systems thinking, reframing, and reflection. Systems' thinking, in this study, refers to the leader's ability to see systems holistically by understanding the properties, forces, patterns, and interrelationships that shape the behaviors of the systems, which provides options for actions. Reframing refers to the leader's ability to switch attention across multiple perspectives, frames, mental models, and paradigms in order to generate new insights and options for actions. Reflecting means the ability to weave logical and rational thinking through perceptions, experience, and information to make judgments as to what has happened and, to create intuitive principles that guide future actions. Systems dynamics, in this study, refers to the participants understanding of systems' properties identified from general systems theory.

A sample of about 180 primary schools, 180 secondary schools and 20 special schools in Hong Kong were randomly selected and invited to take part in the study.

Three leaders in administrative positions from each of the schools, including the Principal (or the Head) and two of their Vice-principals (or Deputy Heads), were invited to respond to the Chinese version of the STQ. In total, 635 respondents returned the questionnaires, which accounted to about 55.4% return rate. The reliability coefficients for the subscales were as follows: Systems Thinking (0.77), Reflecting (0.76), Reframing (0.69), and Perceived Leadership Effectiveness (0.93).

Results and Discussion

By adapting Pisapia's study (2009) of the strategic thinking capabilities of leaders in the United States and developing the Chinese version of the Strategic Thinking Questionnaire (STQ) (Pisapia *et al.,* 2009) attempts were made to determine if there is a relationship between the cognitive capabilities of educational leaders in Hong Kong and their success. Based on empirical data collected from educational leaders randomly selected in Hong Kong, the major statistical findings among the variables in the research framework are as follows:

1. The study shows that (a) the three strategic thinking capabilities were positively associated; (b) there is a significant correlation between Systems Thinking and Reflecting, with a coefficient of 0.50; while (c) other associations are only weak.

2. Hong Kong school leaders with strong understanding of system dynamics make greater use of the three strategic thinking capabilities (systems thinking, reframing and reflecting) than those who have weaker knowledge. The finding indicates that knowledge of system dynamics and the practice of the three strategic thinking capabilities are highly associated and both will reinforce to each other.

3. Reflecting and reframing had no significant effects on perceived leader effectiveness. However, systems thinking had positive and significant effects on leader effectiveness in schools. That is, the practice of systems thinking is a strong predictor of leadership success and it matches previous propositions (Senge, 1990) and research (Pisapia, 2009). It might be concluded that systems thinking is a crucial determinant of success in leadership and organizational learning.

The study of cognitive capabilities of leaders is in its infancy. Therefore, it is difficult to accurately assess the true impact of strategic thinking to leader success. The current study tends to support earlier work by Pisapia (2009) and Pang and Pisapia (in press) that improving strategic thinking capabilities can enhance a leader's effectiveness. Three major impressions of the way the leader processes information were gleaned from the statistical analyses presented in the findings section of this paper. First, the use of strategic thinking capabilities significantly (directly and indirectly) distinguish between more and less successful leaders. Second, there was a cumulative impact of the use of the three capabilities, which formed the strategic thinking construct. The strength of the relationship between strategic thinking and leader success increased as leaders used the three cognitive processes in tandem. However, systems thinking explained most of the variance of the impact of strategic thinking on leader success. Based on the findings, we conclude that successful leaders use the three strategic thinking capabilities

differently than less successful leaders. Furthermore, systems thinking presented greater explanatory power than reflection and reframing.

Conclusion

Hong Kong, like many societies, has experienced a pervasive and influential transformation of its education system. Surrounded as they are by such a vast number of technological, economic, cultural, political, and social changes, occurring at ever-increasing speeds, it is no longer enough for educational leaders to think linearly and simply to react to them (Lam & Pang, 2003; Senge, 1990; Pisapia, 2009; Pang & Pisapia, in press). Hong Kong educational leaders are required to handle change more strategically than before and are required to think strategically in coping with the challenges arisen from an increasingly complex environment (Mintzberg, 1994; Hooijberg, Hunt & Dodge, 1997; Gamage & Pang, 2006). As far as educational leaders are concerned, their ability to deal with change lies entirely in how they think and how they help their members prepare themselves for continuous professional development (Pang, 2006).

These findings are promising because they add to earlier findings in the USA and Hong Kong context, which indicate that aspiring leaders would increase their chances of success by developing their strategic mental capabilities. Similarly, colleges and universities should take note of these results and begin to introduce the capabilities of systems thinking, reflection, and reframing into their classes for aspiring leaders. Practically, school districts can be confident that their screening and hiring protocols should also benefit from information provided by the STQ. Finally, individuals currently in leadership positions should assess themselves and build a professional growth plan that prioritizes the development of school leaders.

A few limitations should draw readers' attention. First, this study was conducted on a sample of principals from Hong Kong; the results cannot be generalized beyond that education system. Furthermore, the instrument was administered in Chinese, while the original instrument was developed in English. Therefore, one caution must be exercised in attempting to use results obtained on the Chinese administration to the original instrument, which was developed and field tested in English. Language translation and cultural issues may impact the results. Additionally, the instrument was administered to principals. Results may not be generalized to professions other than that of school principal even though the instrument may have been designed for other purposes.

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NICHOLAS SUN-KEUNG PANG & TING WANG

INSTITUTIONS' ESPOUSED VALUES PERCEIVED BY CHINESE EDUCATIONAL LEADERS

Abstract

This paper presents some key findings of a quantitative study which assessed a group of Chinese educational leaders' value orientations. A survey instrument "The Institutional Values Inventory" was used to investigate their perspectives on the values espoused by their institutions in terms of traditional Confucian ethics and values of hierarchical relationship, collectivism, humanism, and self-cultivation. It discusses implications for leadership preparation and practice in an increasingly globalized context.

Keywords: Value orientation, Confucianism, educational leadership, China

Chinese culture and leadership

The concept of culture has become increasingly important in the discourse of educational leadership and management. Many writers have argued for a comparative cross-cultural perspective where the influence of societal culture upon educational leadership is researched and compared across societies and cultures (Lee & Pang, 2011). Wider exposure to non-Western knowledge and practices can add richness to our understanding base through exposing alternative ways of thinking and working. Researchers suggest that a culturally and contextually sensitive approach to the study of educational leadership is needed (Begley, 2000; Chapman, 2000; Cheong, 2000; Dimmock & Walker, 2000; Hallinger & Kantamara, 2000; Ribbins & Gronn, 2000; Stott & Low, 2000; Walker & Dimmock, 2002).

Chinese culture, like other great cultures of the world, is rich in history and content. Huang (1988) argued that Chinese culture and values have been quite consistent over the long years despite the change of time. Many scholars (e.g. Chen, 1995; Cragg, 1995; Seagrave, 1995; Wong, 2001) suggest that there are certain historical-social influences on the development of management and leadership practice in China, such as Confucianism, Taoism and the strategic thinking of Sun Tzu. Confucianism became a structure of ethical precepts for the management of society based upon the achievement of *social harmony* and *social order* within a hierarchically arranged society. The Chinese cultural, historical and social contexts have great impacts upon leadership traditions in China. Respect for hierarchy, maintaining harmony, conflict avoidance, collectivism, face, social networks, moral leadership, and conformity are the key values that have affected leadership traditions in China.

Bush and Qiang (2000) have argued that the diversity and complexity of culture is reflected in the following aspects in the Chinese education system. Contemporary Chinese culture is a mixture of traditional, socialist, enterprise, and patriarchal cultures. Consequently, leadership traditions and conceptions have been influenced by different elements of culture and forces. Leadership is regarded as a culturally complex and a context dependent concept. These four major elements of

contemporary Chinese culture continue to shape educational leadership, which is overwhelmingly male, with a balance between hierarchy and collectivism. Although the emergence of enterprise culture and market socialism seems to be slowly changing the nature of Chinese contemporary culture and social values, such cultural change is unlikely to be radical and transformational, given the cumulative and enduring nature of the indigenous culture. An incremental cultural change is expected in Chinese education in the long run.

The traditional conceptions of leadership in China are mostly associated with a directive, hierarchical and authoritarian "headship", together with an emphasis on moral leadership, self-cultivation, and artistry in leading. This review highlights the cumulative and enduring nature of Chinese culture and raises the need to understand contemporary Chinese educational leadership and value orientations in changing contexts. The study explored the value orientations of a group of Chinese educational leaders and examined whether Confucian ethics and values continue to be emphasized in educational leadership and management in the contemporary Chinese context.

Theoretical Framework for Assessing Confucian Values

Confucianism, established more than 2000 years ago in Ancient China, has been a vast, interconnected system of philosophies, rituals, habits and practices that still informs the lives of millions of people today in Chinese societies (Berthrong & Berthrong, 2000). It is a philosophical system of ethics, values and moral precepts to provide the foundation for a stable and orderly society and the guidance for ways of life for most Chinese people (Erdener, 1997). Confucianism has profound influences on all aspects of human life in art, education, morality, religion, family life, science, philosophy, government, management and the economy (Bell, 2008).

Confucianism as a philosophy and ideology is predominantly **humanist, collectivist and hierarchical in nature.** This is conspicuously reflected in its profound interest in human affairs and relations. These moral and political value systems are essential philosophical factors of self-cultivation, family-regulation, social harmony, and political doctrine (Lee, 1997). Confucius in his whole life aimed to teach about the wisdom of the former sages with the goal of reforming society with a humanistic ideology. Confucius's moral principles are largely in two directions: (1) building the ideal life of individuals, and (2) achieving the ideal social orders (Lee, 1997, p. 141). In order to achieve these principles, Confucius conceived benevolence or **humanity** as the major paradigm of goodness.

Confucius also aimed to reform society with an advocacy of **collectivism**. Confucius' collectivism is vividly displayed in its emphasis on collective values and interests rather than individual values and interests. The family as the archetype of the collectivity occupies the core position within Confucian ethics and values. With two thousand years of evolution, the emphases of collectivism in the Chinese culture are far beyond the familial collectivism and have been extended to institutional and national relationships (Ip, 1996).

Confucianism also provokes a fundamental core belief in the **hierarchical ordering** of personal relationships (Erdener, 1997). On a broader scale, there were five basic human relationships as conceived by Confucianism — the mutual relationship of the Five Codes of Ethics or Five Relationships. The five

relationships: emperor-officials; father-son; brother-brother; husband-wife and between friends, with the exception of the last one, all exhibited a strong superordinate-subordinate relationship (Ip, 1996). This acceptance of unequal relationships in society reflects the underlying model of relationships found in the traditional Chinese family between father and son, in business enterprise between employer and employee and in the government between senior and junior officials. All these underscore the fundamental importance of personal relationships in Confucian cultures and societies.

In order to build the ideal life of the individual and achieve the ideal social order, Confucius asserts that education is to make it possible for individuals to live the good life in the community and state. Accordingly, moral cultivation is a core educational goal (Lee, 1997). What follows is presumably the basic teaching of how man should relate himself to the social groupings and society that surround him. Within the Confucian moral edifice, the closest text from which one can obtain a notion of civility of the person presumably is *the Great Learning*. In Confucius' words, those who wished to bring order to their states would first regulate their families; those who wished to regulate their families would first cultivate their personal lives; those who wished to cultivate their personal lives would first rectify their minds; those who wished to rectify their minds would first make their wills sincere (Ip, 1996). That is, achieving the goal of **self-moral cultivation** is the single most fundamental human endeavour of a person's life, and only by achieving this goal will the person be able to regulate the family, govern the state, and rule the world.

It is to envisage that the core traditional values and ethics underpinning Chinese educational leadership are hierarchical relationship, collectivism, humanism, and self-cultivation. These form the theoretical framework for assessing the extent to which these traditional values are espoused by Chinese educational institutions. The meanings of four scales of Confucian ethics and values in the context of Chinese education are briefly delineated as below.

- **Hierarchical relationship** refers to the hierarchical and organizational structures in an institution built to facilitate and enhance the achievement of goals.
- **Collectivism** refers to the strategies in managing an institution that facilitate the development of a collective culture.
- **Humanism** refers to the ways in which administrators adopt to build a reciprocal understanding among people and to enhance respect for employees.
- **Self-cultivation** refers to the value system that leads to the development of individuals' full potentials and their ethical spirits and moral standards.

Research Methodology

Research instrument

A standardized instrument, *The Institutional Values Inventory* (IVI), was developed to assess educational leaders' value orientations in their respective institutions. The development of the original measures was made following an extensive literature review and with a particular focus on administrative values and

ethics within institutions. Eight subscales of institutional values were hypothesized as indicators of Confucian ethics and values of hierarchical relationship, collectivism, humanism, and self-cultivation. The practice of *formality and bureaucratic control* are indicators of Confucian values of hierarchical relationship among people within school organizations; *participation, collaboration and collegiality* are indicators of Confucian values of collectivism; *goals orientation, communication and consensus* are indicators of Confucian values of humanism; and *professional orientation and teacher autonomy* are indicators of Confucian values of self-cultivation.

Participants

The subjects of the study were 67 Chinese educational leaders who enrolled in an Australian transnational leadership programme in Zhejiang Province, China, in the year of 2011. The backgrounds of the participants were diverse in terms of working experience, age, rank and position. Most of them held leading positions in their institutions, including principals and senior teachers in primary and secondary schools, directors and unit heads in the local education systems, professors, lecturers and administrators in the higher education sector.

Data collection

The participants were asked to complete *The Institutional Values Inventory* (IVI) and rate 53 value statements on a 6-point Likert scale from 1 "Very Dissimilar" to 6 "Very Similar." The IVI was designed to assess the organizational and managerial values that are espoused by the participants and the institutions, and the degree to which the two groups share these values.

Findings

Based on a proposed framework for Confucian ethics and values in educational leadership as described in previous sections, a survey instrument "*The Institutional Values Inventory*" was used to examine if the four Confucian ethics and values, i.e. hierarchical relationship, collectivism, humanism and self-cultivation still exert strong influences on contemporary Chinese education institutions. The four major scales of Confucian values were assessed in terms of eight subscales of value orientations that were espoused by the institutions in daily managerial practices (Institutions' Espoused Values, IEV). Participants from three different sectors (schools, higher education institutions, and education systems) were invited to give responses to the IVI. The results of the assessments gave the IEV profile for all the participants. Some of the key findings are summarized as below.

Value orientations of the group

The findings show that participants had a higher regard for collectivism, humanism, and self-cultivation than their institutions in terms of the ways an education institution should be operated. Interestingly, hierarchical relationship was the most important value espoused by educational institutions, while it is also the least favored value held by individuals. In a similar vein, collectivism which was highly valued by individuals received lowest attention from institutions. This may result from a confrontation between the existing bureaucratic and hierarchical culture and the emerging democratic culture and participation in Chinese

educational institutions, with the former favouring political and systemic interests, and the latter stressing the interests and desires of people working in and for institutions.

Values Espoused by Institutions in three sectors

As for the profiles of institutions' espoused values across schools, universities and education systems, a consistent pattern across the three sectors with institutions' particular preference for hierarchical relationship is detected. This can be explained by the cumulative and enduring nature of the Confucianism which provokes a fundamental core belief in the hierarchical ordering of personal relationships. It is interesting to note that universities and education systems espouse similar institutional values in terms of a high regard for hierarchical relations, a relatively low emphasis on collectivism and self-cultivation. Unlike their counterparts in higher education sector and education systems, school principals reported very different institutional values espoused in their schools. A consistent and much higher regard for humanism, collectivism and self-cultivation is found in schools, with hierarchical relationship considered as the least preferred institutional value.

The different cultures of the three sectors and the nature of their work may explain such differences. School principals were generally educational practitioners and site-based leaders who were practically oriented. Compared with system officials and university administrators, they tended to pay more attention to operational issues related to learning, teaching, and site-based leadership. They also seemed to have considerable autonomy in running the schools within a broadly prescribed framework. They generally operated in a less bureaucratic culture than the other two groups.

Implications

This study explored the value orientations of a group of educational leaders in China. The findings reveal that Confucian ethics and values of hierarchical relationship, collectivism, humanism and self-cultivation continue to shape educational leadership and management in the contemporary Chinese context. This study was exploratory since it was based on the survey responses from a small sample of 67 participants in a leadership programme. Further research is suggested to examine the value orientations of large samples of educational leaders in other regions of China. Many participants in this study indicated the tensions existing in their workplaces between the traditional Chinese value orientations and Western orientations in an increasingly globalised context. They also indicated their dilemmas in addressing these issues. They were subjected to the strong forces of various contexts, which mediated the influence of globalization.

The findings in this study provide implications for leadership preparation and practice in the new era. Leadership is acknowledged as a value-laden concept (Gronn, 2001; Sergiovanni, 2001). Walker (2005) argues that leadership is constructed within a social milieu comprised of multiple, overlapping and constantly shifting contextual factors. These include, but are not restricted to, cultural, political, historical and economic influences. Leadership is socially constructed within each context and therefore leadership development programmes need to work with, not against the culture and context within which leaders work (Walker, Hallinger &

Qian, 2007). It is increasingly clear that leadership development programmes need to be based on a localized curriculum, both in terms of knowledge and culturally-sensitive approaches to learning and leading. It is important for programmes to note that learning "how to do a job" does not occur in a professional or organisational vacuum.

The research findings support Hallinger's (2003) recommendation that new globally-derived, research based findings as well as indigenously crafted knowledge about teaching and learning and leading schools represents legitimate subjects for learning among prospective and practising school leaders. We would argue that an awareness of indigenous cultural values in an increasingly globalised context and a contextual and cultural sensitivity will guide the immediate way forward for educational leadership development.

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AMELIA MOLINA GARCÍA

SOCIAL SERVICE COMMUNITY EDUCATION AS AN AREA OF TRAINING AND PARTICIPATION FOR SOCIAL DEVELOPMENT

Abstract

This paper presents the conditions and characteristics of a rural community education program in the Mexican context. The scheme of operation and participation of young people called Community Instructors (Instructores Comunitarios or IC) is innovative and worthy of recognition as a learning area, not only for school purposes but as one which promotes the development of social awareness and commitment for the common welfare. One in which identity-projects and social networking contribute in favor of the development of autonomy of participating subjects as well as of the social commitment, both for providing educational services and in their future everyday life.

The data was obtained from the results of a research on indicators and processes for the formation of a political culture in ICs of CONAFE-Hidalgo (Molina, 2008 and 2011).

Background of subjects and communities

In Mexico there are many rural communities of less than 500 inhabitants who occupy about 12 percent of the total population. These small towns do not have some of the basic services including education. For this reason, more than twenty years ago, an educational institution called the National Council for Educational Development (Consejo Nacional de Fomento Educativo, CONAFE) was created. It deals with community-based education for these populations.

A particular feature of this institution is its educational service structure supported by high-school students who are called Community Instructors (Instructores Comunitarios or IC). They are responsible for developing elementary educational programs and community work. To develop such an activity, they receive a two-month initial training and then a permanent training (one weekend every month during one school year, a total of ten months).

The first part of the training is given by people working in the Institution, assisted by young people of ages close to theirs, who are known as Guardian Trainers (Capacitadores Tutores or CT).

Even though this educational model is interesting and innovative, I would like to present the training and participation processes of these youngsters because their experience favors social awareness and social commitment.

Ever since 1971, when this educational model was created, CONAFE sought the participation of young people, with ages from 15 to 22 years who previously had been involved in the teaching of reading and writing as part of a literacy process. Its success led to the creation of and educational model called Community Courses.

In order to have the educational model and the training of youngsters coincide, the institution created a *cascade-type training model* whereby the Academic Coordinators (CONAFE-Delegations staff) are being taught by Central Office Personnel. This knowledge is to be transmitted to the group of youngsters who, after

a year of experience in a specific community, are in turn Community Guardian Trainers of a new group of ICs. In this second stage, there is a bi-directional teaching-learning relationship among these young persons, whose interests, interaction and language are similar. It is also to be noted that the subjects learned in elementary education are still fresh in their minds.

Initial training is concerned not only with the mastery of content in educational topics but also with the appropriation of a *multigrade* methodology (CONAFE, 1996) which develops an ability to work with children of different ages and interests and also with varied levels of knowledge-acquisition within a group. One of the assumptions underlying this model is that it offers students the opportunity to help each other, finding it easier to acquire new knowledge which will lead to collaborative and cooperative work (Coll et al., 2007), a characteristic of modern pedagogues who create educational atmospheres which lead children to learn from that which Vygotsky (1996) called the nearness-development zone.

This type of work is part of everyday activities because youngsters work for the acquisition of knowledge in an independent way but at the same time collaborate with each other. Watching them work (Molina, 2008), one notices autonomous situations in which they apparently do not show any intention to be bossed by anyone, and share and perform activities as if they were their own business. They know, as any good employer does, how long it will take for them to do a certain activity, how they have to distribute time in order to succeed and which are the expected results. They do not waste a second and, at the end of each class, they know exactly what topics, resources and contents they will have to work on during that month when they are left alone to do their job in their small town.

Creating an organizing methodology to attain autonomy

In tutoring classes, a group of 20 ICs is coordinated by four CTs. These youngsters, not older than twenty-four, are respected in spite of their youth. They lead the sessions showing they know what they are doing. IC learners act as good students would, anxious to learn, and their oral exposition proves their mastery on a theme and when they do not know a topic, they look for it as if they were "expert researchers" until the information is available. During such activities they also show themselves as expert professors preparing their teaching material or organizing themselves in a small plays to present certain subjects; express their proposals on how to do community work, or simply present the contents of the theme they have prepared.

There is a great variety of activities in every session: sometimes CTs explain a specific theme to ICs who act as attentive and receptive and responsive children. Sometimes CTs present class dynamics that help ICs focus their attention or lighten the burden of a ten-hour working day (from 8:00 am to 6:00 pm on Fridays and Saturdays and sometimes even on Sundays). Each participant represents the *facade* (Goffman, 2004) of the role that has been assigned, based on his/her previous experience and in his/her willingness to learn.

The IC group meets every month, works on the learning process, so that upon their return to the community each one will be able to remember and reproduce everything they have learned in the tutoring sessions. Those meetings of hard work give instructors the necessary tools, information and self-assurance to face any

problem in their community, not only related to school activities but also in the communitarian working area. Instructors may indulge in health-care campaigns; conduct any procedure to assist the community or initiate activities to obtain federal or state compensatory programs.

In this context, we notice that the ICs are immersed in an identity construction process, which according to Castells (2001), reflects the plural identities that generate tension and contradiction both in the individual and in the social activities where he/she is involved. Although instructors play different roles as teachers in the community and students in their training or their schooling, or even as community authorities conducting community development work and also as researchers in search of information, we can say that these tensional and contradictory situations are shaping those active subjects who perform a socially-engaged teaching activity that goes beyond the communal service, as social actors that fight for better living conditions, because this situation is meaningful to them (in his/her identity project).

Permanence of young people as key actors in the plot of the programs

A second or even a third year of social service is possible. According to regulations, an ex-instructor may again be an instructor or a CT, if he/she has shown a great commitment and an excellent performance, has been a very good teacher showing a high-quality educational labor and, in addition, has voluntarily and explicitly expressed the reasons for his/her willingness to participate in the programs. Sometimes the reason is that the instructor has had a very empathic relationship with the children or the community members and thus, he/she is backed-up by the parents. Some persons have had problems in their work, but the correct solution of those difficulties has made them grow wiser.

One of the main reasons young people want to continue working as instructors is the financial support they obtain. For each year of community service, they are paid two years of schooling, either to finish their high-school or to start a few semesters of university studies. The maximum period of time to continue as an instructor is three years with up to sixty months of financial support.

After having participated in one or more of CONAFE's activities, a good number of persons recognize their ability to transmit and acquire knowledge. This program in addition to the financial support, simultaneously develops a social commitment in most individuals. It has also been crucial in their professional activities, for it has largely determined the selection of their field of study.

The Parents Association for Community Education (APEC) plays a key role because it is the organizational body within the community that provides instructors with lodging, food and patterns of participation and organization to promote community development activities that go beyond schoolwork. They have the support of the compensatory programs during their stay in the community.

This operational scheme is beneficial in various aspects: the age of students, of the instructors and CTs gives the opportunity of working between peers, and the contribution of youngsters amplifies the educational coverage of elementary schooling, which ensures an acceptable quality education, because the social commitment of ICs and CTs is comparable with that of a professional educator. Frequently, this work surpasses those levels of efficiency and effectiveness of other professors; ICs do not get caught and are not defeated by red tape problems; they

rarely fall into situations of comfort because they regard their daily tasks as something special; they establish an empathic relationship with the community and are willing to do work. The financial support that they receive promotes continuity in their studies and that increases the enrollment of undergraduates or graduates and their identity is shaped based on the common welfare.

While the financial support is one of the main reasons to enter CONAFE, the experience of having participated in this program becomes more important because ICs recognize the personal benefits they obtain. During the last decade it has been observed that both the State and Federal Government provide financial support to promote continuity in the studies from elementary education (Programa Oportunidades) to university studies (Programa Nacional de Becas - PRONABES), which forces CONAFE to compete with those other economic options, in which a student has only to prove his/her family's low income and the minimum grading.

In a welfare State scheme, young people have the social right to have several options to continue their studies. However, in this case, Mexican governments have chosen to consider that young people represent the largest segment of the population and for that reason they must be "taken care of" or as they say, "used" for electoral purposes. In this sense those welfare programs mentioned above are created.

According to the National Youth Survey (ENJ, 2005), youngsters have to leave school early in their lives to enter the labor market. Thus, the reasons to remain in service, may not be based on a romantic vision of community work or the experience with children in the community, but be due to an economic viewpoint closely related to the structural relationships of our country, where social rights and opportunities, both educational and working conditions will be diminished, thus accentuating economic inequality, social and cultural rights. Thus it could be pointing to what the ENJ (2005) states, in the sense that young people could have another option to prolong the amount of time to enter the labor market. One indicator that reflects this option is that the profile of enrollment and permanence in CONAFE has been extended to the age limit of 27 years.

In conclusion: community service is an opportunity for young people to build an *identity-project*

A young person interested in becoming an IC, usually has economic problems and wants to continue studying but requires financial support. His/her desire is working with children or working in rural communities. Some youngsters are enthusiastic, daydreamers, collaborative and have a great deal of initiative. Other young persons express that their participation is due only by curiosity; others say the do it to help their hometown or their country. Very few of the participants have no other option (because they were not admitted into college).

Based on the above, we may say that there are no young people showing a *legitimizing identity*, in which, according to Castells (2001), this identity is one that is shaped on the rules and regulations of the institution, and that hinders the process of autonomy.

The work of a Community Trainer, or IC, is complex and complicated, because at 15, (s)he has to face great challenges. But there is nothing impossible for him/her; (s)he always finds a way to do it, hoping that after finishing the community service (s)he can continue studying. As Castells says, his/her actions define him/her as a

young person with an *identity-project*, and this identity makes sense in his/her life and symbolically defines him/her as a social actor, that is, each reason to stay in the community and his everyday practice leads him/her to visualize him(her)self in the future. If he/she stays, there is the possibility of being part of the community, of opening spaces to participate, of continuing the education of children and act in favor of the development of the community.

In these areas, young people are creating "social networks" where they establish ties that bind different groups of actors through implicit or explicit relationships, ranging from the simple knowledge, lectures and complicity between pairs, to the cooperation and forms of organization to develop a task. Networks are not the result of a single actor, so by being *identity-projects*, their permanent action as ICs or CTs in planning classes and communitarian activities and also in the development of each course, makes them partakers of a group of interactions that lead to the welfare of everyone.

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ENGLISH LANGUAGE EDUCATION POLICY IN COLOMBIA AND MEXICO

Abstract

English language education policies have attracted the attention of researchers in applied linguistics and English language teaching world-wide in the last few years. Some contend that English language skills are vital if a country is to participate actively in the global economy and individuals are to have access to knowledge for social and economic development (Richards, 2008). Others claim that behind the spread of English is a growing transnational business with headquarters in Britain and the USA (Canagarajah, 1999; Phillipson, 1992). The problem is that language policies are ideological although the ideology may not be acknowledged by practitioners or theorists (Ricento and Hornberger, 1996). ELT professionals – teachers, material designers, textbooks writers, program developers, administrators, consultants or academics – are involved in one way or another with the processes that involve the spread of English and they need tools to investigate how the language became so dominant and why, to teach and use English in a way that suits their needs. This paper presents the approach proposed by Ricento and Hornberger (1996) to analyze foreign language education policies. Then, the approach is used to examine the English language education policies in Colombia and Mexico. The aim is to acquire a better understanding of how the ideology transmitted with, in and through English language has penetrated these two Latin American countries.

Language Policy Analysis: Unpeeling the Onion

Although there is currently no unified theory of language policy, several frameworks have been developed to explain the ways in which policies have certain effects in specific contexts (Phillipson, 1992; Tollefson, 1995). Ricento and Hornberger (1996), for example, propose an approach that views language policies in terms of layers. The authors use the metaphor of an onion to represent a language policy with layers of agents, levels and processes. At the outer layers of the onion/policy are its objectives, articulated in legislation at national level, operationalized in guidelines at local level. The guidelines are interpreted and implemented in institutional settings (middle layer) such as schools, government offices, or businesses. In each of those settings or contexts, individuals (inner layer) interact. At each layer (national, institutional and interpersonal) one can find characteristic patterns of discourse (oral and written) that reflect goals, values and personal identities. These discourses are structured by ideologies. Within each layer, competing discourses create tensions in the formation and implementation of a policy.

Looking more closely at the outer layer, which concerns the role of the state in the development and the implementation of the language policy, Ricento and Hornberber (1996) maintain that the states have the resources to engage in language planning that are not available in other sectors of society and the ability to operationalize language policies through regulations. States are most likely to engage in policy activities in those areas that serve their interests and where the

structures exist to disseminate the policy. The middle layer, composed of all institutions, have a large impact on language policy development because institutions involve not only schools and universities but also book publishers and education consulting services. Finally, the layer at the center of the policy/onion involves classroom practitioners, who need to be prepared according to the language policy being developed or implemented. The following sections present the analyses of the English language education policies in Colombia and Mexico using the framework provided by Ricento and Hornberber (1996).

English Language Education Policy in Colombia

Colombia is located in northwestern South America, bordered to the north by the Caribbean Sea; to the northwest by Panama; to the east by Venezuela and Brazil; to the south by Ecuador and Peru; and to the west by the Pacific Ocean. It covers 1140000 sq. km., similar to the area of Portugal, Spain, and France together. It has over 46 million inhabitants. Before the Spanish colonization of what is now Colombia, the territory was home to a significant number of indigenous peoples. Today indigenous communities comprise some 800,000 people, roughly 2% of the population. The 1991 constitution established their native languages as official in their territories, and most of them have bilingual education (native and Spanish).

The outer layer

Law 115 approved in 1994, related to the objectives of basic and middle education demands "the acquisition of elements for conversation, reading, comprehension and the capacity of expression in at least one foreign language" (Ministerio de Eduación de Colombia). Once this law was approved, schools started the teaching of English as a foreign language without an established policy or program. The Ministry of Education simply supported the local education authorities and started involving universities, language centers, international cooperation organizations and learning material providers.

It was not until 2003 that the English Language Program was launched in the capital city of Bogota by the Municipality, the Government of Cundinamarca and the Chamber of Commerce. Its objective was to make the city more competitive in the international level. The aim was to increase the number of bilinguals (English-Spanish) in the period from 2004 to 2014. Gradually, other cities followed until the Ministry of Education implemented the policy now known as *Bilingual Colombia* or National Program of Bilingualism 2004-2019. The program is directed to all students of elementary, middle, high school and university studies. The program includes a set of standards of communicative competence in English, based on the Common European Framework (CEF). The program states that "Being bilingual is having more knowledge and opportunities to be more competent and competitive, and improving the quality of life of all citizens" (Ministry of Education of Colombia, n.d.).

For the creation of the Program, the role of the British Council was pivotal. A diagnostic study was carried out in 40 Normal Schools in 25 entities. Online surveys and English language tests were used to evaluate the teaching of English in Normal Schools. Results indicated that the even when students took English courses three hours a week for six years (from sixth to eleventh grade), students had very low

levels of proficiency. It was concluded that there were deficiencies in the teaching methods used and new models were designed by the British Council to improve the quality of English education. The language policy suggested included three areas of development: language, communication and culture. The articulating themes proposed were: openness to others, tolerance of difference, capacity to communicate effectively with members of other cultures and valuing the native culture.

The middle layer

The language education program in Colombia is supported by a number of institutions. The ICETEX, for example, is a State entity that provides financial aid to population with low income and good academic standing. It also gives access to education opportunities provided by the international community to raise the quality of life of Colombians and contribute to the social and economic development of the country. This organization created the program *Languages without Frontiers* to support teachers of public and private schools who want to take language courses (French, Italian, or English) at low cost in Colombia. It also provides financial aid to study abroad. Finally, ICETEX manages an exchange program in which citizens from France, England, Jamaica, and Barbados teach languages in Colombian schools, while Colombian teachers teach Spanish in those countries.

Public and private universities have also played an important role in the implementation of the foreign language policy in Colombia, particularly to promote the British teaching qualifications. The National University of Colombia and Universidad de la Sabana, Coruniversitaria, de Ibagué, Atlántico, del Norte, in Barranquilla, and Tecnológica de Pereira, for example, permanently offer the In Service Certificate of English Language Teaching (ICELT) for university teachers and the Teaching Knowledge Test (TKT) for elementary and middle school teachers.

Another example of the middle layer agents involved in the implementation of the language education policy in Colombia is the Israeli enterprise *Edusoft,* which operated between 2007 and 2009, providing English language education to 115,000 adults in a nation-wide project using multimedia software.

The inner layer

Language teachers have had the most difficult part in the National Program of Bilingualism 2004-2019 in Colombia. In 2003, according to the studies of the British Council, 63% of all Colombian English language teachers had a low level of proficiency in that language (A1 – A2 according to the CEF). The government established a minimum of high intermediate for the year 2009 (B2 of CEF). Also, new regulations were created to introduce French language in the mandatory curriculum of high school. The Alliance Française is in charge of training French language teachers of public schools. Private schools and language centers in Colombia are required by law to hire only teachers with a minimum level of B2 in English or French.

The professional development actions taken by the Ministry of Education and suggested by the British Council have received numerous criticisms by Colombian scholars. Ayala and Alvarez (2005), for example, have argued that adopting foreign standards may be misleading because of the differences between European and

Colombian students. The authors invite the government, administrators and the academic community to adopt a critical view on the adoption of foreign models that do not respond to the needs of the Colombian learners. Also, Gonzalez Moncada (2007; 2009) affirms that Colombian teachers need new models of professional growth that incorporate post-method approaches; and that teacher development programs should recognize locally produced knowledge and the collaboration of policy makers and national scholars.

Language Education Policy in Mexico

Mexico is located in the North American continent, with the United States on the north, Guatemala and Belize on the south, the Gulf of Mexico on the east and the Pacific Ocean on the West. It covers 1,972,550 sq. km. with a population of 103,088,021 inhabitants. Mexico is the world's largest Spanish speaking nation. Although not defined in legislation, Spanish is *de facto* the official language spoken by about 90% of Mexicans.

The outer layer

The Constitution of 1917 considers the country as multicultural and promotes bilingual and intercultural education. In 2003 Congress recognized indigenous languages as national languages with the same validity as Spanish and approved the General Law of Linguistic Rights of Indigenous Peoples. This law protects about six million Mexicans who speak indigenous languages. It has been estimated that more than 100 indigenous languages and dialects were spoken in Mexico before the Spaniards colonized Mexico in 1492; however today around 60 indigenous languages are still used, only 28 of them with more than 10,000 speakers (Baldauf & Kaplan, 2007). The Ministry of Education has an office for indigenous education, teacher training and language learning materials.

In contrast to Colombia, in México there is no law related to foreign language learning. The idea of improving English language learning emerged in the context of the poor performance of the Mexican Education system in the Program for International Student Assessment (PISA) in 2006. The Organization for Economic Co-operation and Development (OECD) made 12 recommendations among which were: establishing clear levels of performance expected from students in key areas at the various stages of schooling; and enhancing teaching quality through the development of programs that focus on understanding the curriculum, and the evaluation of teaching and learning. To heed the recommendations, in 2008 the Ministry of Education initiated the Integral Reform of Basic Education (IRBE). The Reform considered as one of its challenges in elementary school "the continuous and efficient learning of a foreign language -English- as a state determined program" (Secretaría de Educación Pública, 2008), and developed the National English Program for Basic Education (NEPBE) in 2010.

The NEPBE aims to provide a curriculum for basic education; to design the teaching materials; and to plan and implement teacher training programs (Secretaría de Educación Pública, 2011). The purpose of the program is that the students participate in different activities that involve the production and interpretation of oral and written texts, of everyday, academic and literary nature, to be able to satisfy

basic communication needs in familiar situations. The program includes a set of standards, based on the standards of the Common European Framework (CEF).

The middle layer

Private rather than public universities have played an important role in the implementation of the foreign language learning policy. The Mexican Ministry of Education has provided teacher training to NEPBE teachers through institutions as Instituto Tecnologico de Estudios Superiores de Monterrey and Universidad Jesuita de Guadalajara.

Other institutions involved in the implementation of the policy are the Office of English Language Programs for Mexico and Central America of the U.S. Department of State, which has been in charge of designing English language tests and training examiners; and the British Council, which has not only been directly involved in the design of the NEPBE program, but has promoted the Teaching Knowledge Test (TKT). This test has been included in the list of standardized tests for language teachers, together with the TOEFL, the KET and PET by Cambridge University.

Book publishers are also influencing the ways in which program is being implemented. A variety of textbooks are being bought by the Mexican Ministry of Education to support the English language policy. Among the book publishers are Fernández Educación, Heine Cengage Learning, Macmillan Publishers, Nuevo México, Richmond Publishing, Santillana, Trillas and University of Dayton Publishing.

The inner layer

Teachers of the NEPBE program seem to be more concerned with the acquisition of qualifications and the attainment of the standards mandated by the educational authorities, than with becoming reflective practitioners that evaluate their teaching, identify problems, find solutions and try new ways of teaching. The model of professional development that the policy promotes focuses on the accumulation of hours in short isolated courses and the gathering of certificates and diplomas. No attention has been paid by education authorities and the Mexican scholars to the disparity between these practices and the new developments in the field of professional development in foreign language education and language education policy.

Conclusions

In Colombia the policy was launched in 2004 articulated to legislation while in Mexico the policy was implemented in 2010 as program guidelines. However, the middle layers of the policies clearly show the economic forces influencing, if not determining, the language policies. These forces come from private universities, software enterprises, book publishers, and the leading role of the multinational academic empire, i.e., the British Council and the Office of English Language Programs of the US. The inner layers seem to indicate that whereas in Colombia scholars are taking a critical stance towards the policy; in México scholars must consider how to promote a better understanding of language policy issues among politicians, bureaucrats and other language professionals.

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COMPENSATORY PROGRAMS IN MEXICO TO REDUCE THE EDUCATIONAL GAP

Abstract

In this paper we approach the issue of compensatory education programs to reduce the backlog in basic education. We address the population living in rural areas, because the Compensatory Programs (CPs) are aimed at them. The presentation is divided into three parts. The first section presents an approach to basic education in Mexico, the second provides information on the development of such programs and compensatory measures whilst the third part discusses the findings, conclusions and challenges that our country is facing to educate this segment of the population.

Introduction

Mexico is a vast country with multiple cultures, there are 63 ethnic groups distributed in 33 indigenous zones of the country. Over the last 40 years, the Mexican educational system has moved towards the enhancement of quality universal education for its heterogeneous population, and the creation of an administrative system that allows innovation rather than hinders it. Traditionally, Mexico has a highly centralized educational system but the extraordinary growth of enrolments has delayed both its functioning and its ability to meet the needs of diverse groups that compose Mexican society (Arnaut, 1998). Until the 1970s, the government's main concern was the expansion of the system, aiming for universal coverage. The 1980s testified to the government's attempts for launching reforms towards educational decentralization and also for achieving the modernization of curriculum and pedagogy. These efforts were channeled into the National Agreement of Modernization of Basic Education, signed in 1992 by the Federal and State Governments, besides the powerful National Union of Educational Workers (SNTE, for its initials in Spanish). All these actors were committed to a new cycle of reforms based on decentralization and towards improving the efficiency and quality of the system. Moreover, reforms were introduced to incorporate marginal social groups and to spread the use of modern technology into the Educational System.

In this paper we shall approach the issue of the Compensatory Programs (CPs) to reduce the backlog in basic education. We shall also address the population living in rural areas, because the CPs are aimed at them. This presentation is divided into three parts. The first section presents an approach to basic education in Mexico; the second provides information on the development of such programs and compensatory measures whilst the third part discusses the findings, conclusions and challenges that our country faces in the education of this section of the population.

Since the onset of the Rural School Program, these kinds of schools have been an important part of the educational network in 21 out of 31 states. Professors at these schools, emphasize the notion of nationalism so that all students have a strong sense of what it means to be Mexican. Even though students already have previous

cultural and identity roots, teachers have become a valuable resource for students to make them think about their identities, in addition to learning about their cultures.

The Mexican education system is one of the largest in Latin America. In 2005/06 it consisted of over 35.2 million students of school age, the great majority of whom were educated in government schools.

Mexico has three types of public education administered at four different levels. These are:

Basic Education, Upper Secondary, and Higher Education. Basic education has the following organization: 25,666,451 pupils (about 79% of all the students) and over 1,175,535 teachers working in over 226,374 educational establishments. Basic education is divided into three levels: a) Preschool that provides early education for children aged between 3 and 5; b) Primary education that consists of six grades; in general, children are registered when they reach 6 years of age in primary school and finish somewhat at the age of 11; c) Lower Secondary Education, that consists of three grades and serves students aged between 12 and 14 (Santibañez, Vernez, Razquin, 2005: 6-7).

The Compensatory Programs in Mexico

CPs in Mexico set out different provisions governing its operating rules and is part of the activities of the National Council for Educational Development (CONAFE, for its initials in Spanish), created in 1971 to attend rural communities so that its population could attend basic education. Initially, its work was realized through the programs set by the Secretary of Public Education (SEP). For this reason, it was necessary to make a teaching fitness permitting access to primary education to children of the scattered and marginalized villages of the country, promoting their retention and academic success. Moreover they offer educational opportunities that allow students to complete their basic education. In this situation are the rural schools, urban-marginalized and indigenous communities. They are divided into two groups: those seeking to improve educational opportunities and those that aim to increase demand. The first group programs seek to improve school conditions and supervision offices, also involved in the development of the different capacities of human resources working locally and in the general education system. The second group programs are designed to strengthen the educational demand, offsetting the high opportunity costs to attend the school in which children and adolescents incur.

The CPs to improve education for disadvantaged populations in Mexico began in 1992. The objective of the CP named Programme for Reducing Educational Backwardness (PARE, for its initials in Spanish) between 1992-1996 assisted 4 states of the Mexican Republic that presented major educational backwardness and marginality in comparison to the national average. These states were: Chiapas, Guerrero, Hidalgo and Oaxaca. Various national and international studies have been conducted to understand its scope and results. This program intended to reduce educational backwardness in initial and basic education (Santibañez, 2004; SEP, 2008).

PRODEI, started in 8 states, sought to develop programs for early childhood education-schooling and was subsequently absorbed by PAREIB, financed by the World Bank. This programme started its Project to Fold Backwardness in Basic

Education Development and to support the continuity and transit of children from preschool through high school to successfully conclude their compulsory education (1998-2007). At this moment, the program selects schools based on their drop-out rates, school population, teacher student ratio as well as failure and repetition. This program is operating to reduce the backlog in the basic education development project and currently operates in all states of the Republic since January 1st 2011, when it came into force on the Agreement 567 (Acuerdo 567). This document set out different provisions governing its operating rules.

PIARE operated in 9 states from 1996 to 1998. It integrates programs for reducing educational backwardness.

PAREB was a program for improving levels of education in early childhood and basic levels in 10 states (1994 – 1998).

PAREIB program selects schools based on their dropout rates, school population, teacher student ratio as well as failure and repetition. According to the results of ongoing assessments, it provides compensatory actions to all indigenous and multi grade schools (CONAFE, 2000). This program has two main components: (1) the improvement of the quality of the Basic Education Development Project, and (2) the strengthening the Institutional Capacity Management. The component of improving educational quality PAREIB aims to improve the quality of education through improvements in infrastructure, school materials and training (Santibañez, 2004: 3).

CPs aimed at increasing the demand to seek and to improve education by engaging parents in decision making at the school in order to develop their opportunities to use information and resources.

PROGRESA, known as well as "Oportunidades", provides cash payments to the beneficiary families to help break the intergenerational cycle of poverty. It also focuses on the promotion of capacity building in education, health and nutrition. The scholarships consist of educational support to purchase school supplies for each child, to encourage their enrollment and regular attendance at school and to encourage the completion of educational levels. The amounts will increase as the pupil continues his/her studies to a higher level. In 2011 scholarships were awarded ranging between 11.50 to 23 US dollars from third through sixth grades and 33.84 to 43.46 US dollars in lower secondary. The amount is slightly higher for girls in this level; two dollars in the first year and 8 in the third, because in some communities parents do not allow girls to continue their studies (Oportunidades, 2011). This is because girls in these communities are usually kept at home to help out with house chores. The result of this program was that a major number of girls can finish their secondary school education. CPs aimed at increasing the demand to seek and to improve education by engaging parents in decision making at the school in order to develop their opportunities to use information and resources.

Discussion and Conclusions

In the past 40 years Mexico has made education policy reforms in different aspects. In the organization and distribution of financial resources for education many changes have occurred, the curriculum and approaches to all educational levels have been re-structured.

Mexico received financial contributions from international organizations when the country joined OECD in 1994. They were deeply concerned to encourage improvements in the most vulnerable people in Mexican schools. This situation has led to extensive discussions on education policy issues such as national coverage, equity and quality.

Several research groups worked in some states of the Mexican Republic and have commented on the following findings.

Lopez (1999) examined the impact on student learning, she found that the PARE program increased learning achievement in rural and native schools, where students had typically not performed as well as other students (in Spanish). Not only did students' cognitive abilities improve under the PARE program, but the probability of their continuing in school improved. In rural areas where the PARE design was fully implemented, test scores for the average student increased considerably in several states, which have the highest incidence of poverty and the lowest education indicators in Mexico. The most disadvantaged schools in these states are those serving rural and Native (non-Spanish-speaking) students. Control data were collected from comparable schools in the state of Michoacan, which did not implement PARE.

Parker (2004) found that "Oportunidades" had an important impact on student enrollment in rural secondary schools, and that the impact has grown over time. This increase has been on TV and general secondary schools, with increases of 24% in the cycle 2002-2003.

The National Institute of Educational Evaluation in Mexico (2003) report important differences in achievement between different areas of the country. In urban schools, 45% and 15% of the sixth graders in Mexican public schools achieve satisfactory competency levels in reading and math on the national reading and mathematics achievement tests administered by SEP (INEE, 2003).

The proportions of students achieving satisfactory competency in reading and math is much lower in rural (29% and 9%), community (18% and 6%), and indigenous schools (12% and 4%), with the latter reporting the lowest achievement levels of all four groups. These differences have prompted the government to shift the education policy discourse from issues of coverage to a focus on educational quality and equity. In the state of Hidalgo we notice a significant improvement between the years 2006 to 2011 in the Test of ENLACE (is the National Assessment of Academic Achievement in Schools conducted every year in Mexico by SEP to all public and private schools basic level, to know the rank of performance materials in Spanish, and mathematics and the field of Natural Sciences (SEP, INEE, 2011).

These averages mask important regional differences. Mexico's public spending on education amounts to 5.9 percent of GDP per capita, above the OECD average of 5.6 percent. Between 1995 and 2001, Mexico's public spending on basic education grew by 36 percent, among the steepest increases of all countries in the organization (OECD, 2004).

Lastly, for over 17 years, SEP has had in place a wide range of compensatory programs. Most of these have been funded with loans from the World Bank. The programs operate under the umbrella of CONAFE (*National Council for Educational Development*) — a department within SEP — and target schools in isolated rural and poor areas. Most of these programs are aimed at improving school

infrastructure, equipment, and materials, and providing incentives to teachers and school principals in order to decrease teacher absenteeism and improve school supervision functions. The budget for these programs is estimated around $200–300 million per year.

Some researchers, organizations nationally and internationally agree that the Mexican system suffers from lack of transparency and objective evaluation. The research system in Mexico has severe limitations.

Nevertheless, despite their relevance, the impacts of compensatory programs have declined in recent years: the budget fell from $282 million per year in 2000 to $183 million in 2008. As a proportion of education spending federal funds channeled compensatory programs decreased from 1.0% in 2000 to 0.54% in 2008.

This shows a picture where the uneven qualities of education from the supply side (teacher quality) are compounded by the demand side (households with low levels of schooling). Faced with a similar (even schools to obtain functional literacy and the quality show uneven distribution by zones and strata), notes that the low quality of school inputs and operation of the education system (which coincides with the poor expectations generated by the demand for education) creates a situation that not only perpetuates the shortages, but making things worse (Schmelkes, 2005).

However, given the results presented and the difficulties in defining and measuring the quality of education, it is necessary to analyze the relationship between spending and quality of teaching (Desarrollo Humano, 2011: 130).

The Mexican experience in compensatory programs has been one of constant evolution and adaptation. The original model has undergone many changes but the original spirit remains intact: to reduce the educational gap for children in more economically disadvantaged areas. Over 18 years this has required a complex interplay between local, state, federal and international efforts to achieve the implementation of a model that has not always been consistent or successful in all cases. Regions or countries seeking to use compensation programs to improve educational equity for their populations need to take into account all these layers of complexity within their own settings to increase your chances of success. (Santibañez, 2004).

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CHANGING TIMES, CHANGING ROLES: FE COLLEGES' PERCEPTIONS OF THEIR CHANGING LEADERSHIP ROLE IN CONTEMPORARY UK POLITICO-ECONOMIC CLIMATE

Abstract

The work reported in this paper is part of a study that explored some of the roles of Further Education Colleges in the United Kingdom. The paper is based largely on literature from books and on-line resources and short interviews from five British further education colleges, but also on the author's views and experience. The major aim of the essay was to explore the notion and beliefs that the further education colleges are the champions of leadership in education within our society. The study also aimed at examining the institutional factors from the perspective of leaders, and how these may impact on their mission statements, and the engagement of people and community in learning where they are situated. The paper found that the colleges, in addition to fulfilling the primary role of developing talent and innovation capacity of the community by encouraging people to have a second chance at education and leisure, providing vocational qualifications and other great learning that are below level two, they also engage in the social challenges that face the community, for example, faith issues, extremism and drugs. They are the power base in which to build the creativity sector of the community, which will drive directly the country's competitiveness. They are nonetheless, associated traditionally with transactional model of leadership which builds on order and accountability. However, there are still few institutional challenges faced by the colleges in general, which included the issues of raising the aspiration of young people and removal of racial tension which characterised the past. There is also the issue of working with young people in the community and, actually making sure they begin to trust and to view colleges in a positive light. Finally there is little evidence of institutional enthusiasm for working in partnership with other Agencies in order to promote well being, ensuring students' work continues.

Keywords: Further education colleges, Leadership roles, Transactional, Transformational leadership, Creativity, Vocational qualifications, Management, College Missions

Introduction: Traditional Further Education Colleges Roles in the Community

The conceptions of leaders in education seem pretty obvious; engagement in learning, providing vocational education, building support services, encouragement and empowerment of people. However, further education (FE) colleges can do more than just that; they are typically leaders in their community, not just only in education but as institutions that can drive economic development and regeneration through their presence, participation and leadership (Rammell, 2008). Change in people's opinion and attitude because of good leadership will ultimately lead to change in the culture of the community; consequently, will bring about change in respective behaviour of individuals. While FE sector core role remains the development of talent and innovation capacity of the country, the focus extends

beyond purely vocational and includes the ability to engage with the social challenges that face our society. The colleges have the responsibility of engaging with some of the more challenging aspects of the community life. In some areas, this includes working directly with the communities to develop resilience to those ideologies that promote hatred and violence. Therefore, the crucial role played by FE sector in the community cannot be over emphasised, especially in the current economic climate and the new Department for Business, Innovation and Skills (BIS). Today, Further Education Colleges are the resource of power base to build up the skills sector, knowledge sector, and the creativity sector of the community that will derive Britain's competitiveness directly. Kevin Brennan MP (2009), maintained that FE sector primarily is a focal point in helping people and businesses to come through the recession, in helping people make the most of their talents and their lives, and in building a better Britain. It is therefore the view of this paper that Further Education sector is a second chance manager, which provides opportunity for people who may not get through the education system first time round successfully. In recognising the place of FE in our contemporary society and in realising the intellectual environment and commitment to shared values and vision, Further Education sector therefore can be viewed as the leader in education in our communities.

Current Politico-economic Climate and Basic Questions about Changing Roles

The research that forms the basis for this paper deals specifically with the general dimension of leadership in Further Education sector. In our world of changing paradigm in education, management differences have a significant impact on leadership and therefore on the understanding of roles played by Further Education Colleges. In the past, it was a general belief that Further Education sector had no distinguishing roles within the community; however, that perception has changed over the years as Further Education Colleges assumed the leadership roles by providing vocational and technical knowledge base education, which leads to increased skills need of young people within the community. Again the past scepticism over their leadership is becoming less hierarchical and more participatory. This paper also focuses on the most important aspects of personal development and competence in today's intellectual field. Nowadays, the main challenge for Further Education Colleges as leaders is the management change in policy in education; including community needs, learners' needs, cultural differences, business, innovation and skills acquisition that will enable our young people to compete favourably in the world job market. This paper therefore, will discuss some of the intractable and management issues surrounding Further Education Colleges and the Colleges' need to sustain leadership imbalance in business, innovation and skills; and in doing so, looks at a number of issues and responsibilities pertaining to leadership and educational management in the sector. It is assumed that by 2025, FE colleges should become the backbone of an inclusive lifelong learning system and culture, and working in close co-operation with various local and national partners (Niace, 2009) to promote coherent vocational education and skills.

Research Approach, Methods of Data Collection and Analysis

Research approach is the combination of qualitative and quantitative models. This paper is based on the online research of five British further education colleges. These colleges are located in different parts of UK to include; London and South East, North East and North West of England. A number of factors played in the use of online research journals and books; these include the nature of study which is purely to establish through relevant journals that further education colleges are truly the leaders in education. The method of data collection is through on-line questionnaire administered to 5 selected FE colleges covering three main regions – SE, NE, and NW as above. *There is no guarantee of justified sampling, nevertheless, provides preliminary insights into the activities of the colleges.* The researcher had visited the websites of the colleges and had made telephone interviews to the colleges concerned. This consolidatory approach is used to provide further insights into the information made available through the questionnaire. Developing from the above, the researcher draws upon the quantitative and qualitative data from literatures to ask the questions around the issues on the current role of FE colleges and whether FE colleges actually see themselves as leaders within the community. This was necessary considering the time and scope of the study and what it was meant to achieve. There were no difficulties in developing the few questions and in obtaining responses to the questions asked. This was made possible through the review of the literatures on the FE leadership and various government white papers on the topic. Interviews with the institutions took only a few minutes and were based on open-ended questions which were asked to all five colleges. The aim of the interviews was to highlight the major roles played by the colleges which impacts on the student personal development and competence in today's intellectual field, and the community cultural cohesion. The interviews also seek the colleges' views about their mission statements and how they are meeting these missions; their perceptions of the role of the college in facilitating student learning within the multicultural Britain, and the process of integration of different faiths within the community. Interview findings were subjected to straight forward content analysis and questionnaires were statistically analysed to gain further insights into frequency of views of the organisations.

Research Findings

The findings in this study are limited only to five further education colleges with a view to establishing their leadership roles through their missions and activities, their attendance to personal and community needs in the current educational dispensation. The colleges are identified by letters – A, B, C, D and E. The relevance and perceptions reflected in the findings are associated to the theories of leadership in each of the models summarised above. The results generated from the interview sessions provide important but similar answers with that obtained from literature. In addition to the interviews, a diverse sample from the web allows for exploitation and exploration of specialist roles and differences amongst the colleges. Consistent with the literature on the roles of further education colleges, the provision of vocational education emerged as one of the core roles to emphasise when one looks at the leadership roles played by the Colleges. The FE colleges, including the

five used as samples, provide leadership roles within their community that promote community cohesion, shared values and prevention of violent extremisms, in addition to giving second chance to the students in their communities. FE college leaders, through the Association of Schools and Colleges (AoE) engage with debate on the role of their colleges because it recognises the centrality and influence that it has had both historically and currently. The colleges aspire to be at the heart of the community they serve and the variety of missions adopted by the five sampled F.E colleges demonstrates this very clearly. The FE colleges come in different shapes and sizes – the students' population usually range between 500 for the smallest to 44000 students' for the largest; they also have different missions and ways of pursuing and managing those missions. In this analysis, I discuss only two of the colleges sampled because I am guided by the paper length for publication.

A - College

The 'A' college mission statement is to provide excellent quality of education, which meets the skills needs of the economy and a commitment to promoting equality and widening participation in education. The college works in partnership with the local council, local people and the police network in order to build and promote unity in services. Gang culture and violence is a typical example where the 'A' college is working assiduously with the police and local council to eradicate the menace. The college also embarked on safe and strong campaign to combat all forms of crime within the college and in the community. The college maintains that young people have choices, and they need to make the right choices that are presented to them through education and community cohesion. There is certain number of risks associated with gang culture in the college, which could be an attack on the staff, a member of the public or student losing money or a member of the gang going to jail. This college strives to put an end if possible to this menace. The college also works with other charitable organisations in providing support to young people in the community; some of the supports they provide include:

- Helping gangs get back to the society/community;
- Taking teaching and learning to hostels to meet disadvantaged groups;
- The facilitation of adult training and learning for students requiring childcare;
- Support for childcare students on work experience within the nurseries section;
- Delivering high levels of learner success and meeting the skills needs of the economy.

The 'A' college has built a strong partnership link with the local authority and other agencies in the community, and this link has helped to support local community efforts and prosperity (Lambeth College Childcare Policy, 2007).

B - College

The focus for 'B' college is on practical courses that work – for young people, adults and employers. (Stoke on Trent Corporate Information, 2009). Their mission statement is excellence in education and skills for work and life. The college also focus on economic and social wellbeing and up-skilling the local work force in the community. Other activities and roles include, but not limited to the following:

- Addressing the needs of the community industrial base;
- Focussing on customer needs and services as a competitive tool and requirement;
- Engaging the community in the 'Learning and Skills' agenda;
- Delivering training in all businesses - ranging from engineering to hotel management and hospitality, and customer services needs as competitive tool;
- Increasing the proportion of local learners progressing to and achieving Higher Education qualifications in the region;
- Building partnership with companies such as Churchill China; and
- Developing people with mechanical and technical skills.

In the past, education in this college was central to what the college thinks appropriate, however; now, education is directed towards skills for improving local and national businesses. The College maintains flexible partnership with companies, ensuring NVQ training provides what the industries need. This effort really made a significant progress with local business communities in the region.

Preliminary Conclusions

According to Cristofoli and Watts (2005), the further education sector has an important role to play in achieving national and regional aspirations for widening participation. *The fundamental responsibilities and roles of the FE colleges are to provide vocational education to both young and adult learners in the community, and to support the lifelong learning of these individuals. These two objectives are interlinked. Although, the FE colleges' roles have been expanding lately and there is evidence of high level of flexibility in terms of perceptions, the perceptive roles however, bestrides both transactional and transformational paradigms, and this has brought great benefits to the community, but also backed up by creativity.* Rather than focusing specifically on direct coordination, control, and supervision of curriculum and instruction, FE sector seek meaningful mission purpose to support the development of change in practices of teaching and learning, policy and community need. The agenda to widen participation addresses two long-standing and interrelated policy concerns: promoting and sustaining economic growth and overcoming social exclusion. Hallinger (2003) posits that FE sector strategically maintains a distributed role that focuses on sustaining economic growth and overcoming social exclusion, developing a shared vision and shared commitment to colleges and community change. Following, Grace (1997) takes the notion that "transformative leadership involves considerable social skills of advocacy, inter-group relations, team building and inspiration without domination". Furthermore, he advocates that this kind of leadership is exercised by a "community of Leaders" as a reflection of the permeation of democratic values, which will "transform the very nature of leadership itself" (Aspinwall, 1998). Developing the above from Foster's transformational and ethical leadership perspective, a leader works with others in the community to obtain transformations of undesirable features of schooling culture and practice. These features might be the existence of racism, sexism, cultism, gang violence and issues of faith in educational practices. It could be the existence of prejudice against particular religious or regional groups or against those with a range

of disabilities and disadvantages in the community (Crawford et el, 1997). One can rightly say that allegiance in terms of leadership model appears to be induced by personal and immediate needs of the society. Halpin & Croft (1966) contends that leadership includes attendance to personal needs; that a successful leader should contribute to group objectives and to group relationship. However, politics and economy can be highly significant in dictating the directions of leadership allegiance. The critical issue or question this paper seeks to engage with is the FE sector's attendance to students' personal needs and community needs at large.

It is vitally important to note that in building future prosperity, wealth creation is the engine; this engine comes through knowledge and skills that further education colleges impart on young people everywhere in our communities. One of the core roles of further education colleges is the development of talent and innovation capacity of the community and the country through the provision of vocational education. However, the current focus has shifted and extends beyond purely vocational and includes the ability to engage with the social challenges that faces our society in this day and age. For instance, in preventing violent extremism, further education colleges promote a shared culture of openness and pluralism with the wider community, regardless of the specific status, location or faith affiliation of the college. Further education colleges also build and support the welfare of individuals, and groups of students through professional standards for teachers, contractual and safeguarding frameworks for all adults working with children and young people, including 'Every Child Matters' outcomes for young people – all require the duty of care and, where necessary, the taking of action. Partnership and collaboration between colleges and other education and training providers is essential ingredient to the successful delivery of new Diplomas and certificates. The DCSF's modelling for future participation heavily relies on further education remaining the biggest provider of 16-19 education, with the vast majority of colleges offering Diplomas since September 2009. Following recent overhaul of education in the UK, it is anticipated that further education colleges would even be lumbered with more responsibilities in the provision of higher qualifications in collaboration with various universities within the community and regions. Developing from the above, there is no question about the role of further education colleges as leaders of education within the communities.

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ROLE PERCEPTIONS AND JOB STRESS AMONG SPECIAL EDUCATION SCHOOL PRINCIPALS: DO THEY DIFFER FROM PRINCIPALS OF REGULAR SCHOOLS?

Abstract

The objective of the present study was to compare principals' perceptions of their leadership roles in regular (Dovno, 1999) versus special education (Zaretzky, Faircloth & Moreau, 2005) schools, and how these perceptions affect feelings of job stress (Friedman, 2001; Margalit, 1999). We predicted that regular school principals would differ in their perceived roles and job stress from their counterparts. Using data obtained from samples of principals in regular education (n = 104) and principals in special education (n = 60), hypotheses were examined and partially supported. Implications for school principals' training will be discussed further.

Introduction

Special education presents one of the key challenges facing educational leaders in contemporary contexts characterized by diversity and comprehensive school reform. As it is known from the literature, these challenges transcend international boundaries; in this case spanning the border of Israel. As expectations increase with more rigorous and demanding academic standards of achievement for all students, the progress of all must be accounted for. To this end the school leader's role has become increasingly important in developing, implementing and sustaining inclusive and equitable educational opportunities for students with special needs. Furthermore, principals need to be able to address the instructional needs of all students while leading in increasingly diverse yet ostensibly inclusive contexts (Fullan, 2003; Zaretzky, Faircloth & Moreau, 2005).

These complicated roles expected from the school principals lead some of them to quit the job (Billingsley & Cross, 1991). For this reason, the aim of this study was to understand better the role of the principal in the administration of education programs from a comparative perspective (regular versus special education) and to look for the factors attached to feelings of job stress in both categories. We argue that such an understanding can assist in the development of professional preparation programs and subsequent professional development activities that have as their focus an approach to instruction and instructional leadership within an accountability context that may better serve the needs of students.

School principals' roles perception

While most of the studies related to principals in regular education are largely descriptive in nature (Dovno, 1999; Rozenblatt & Somech, 1998), studies related to principals at special education schools are normative in nature. They include how the school principal has to do such things as build effective relationships and collaborative work teams in their schools; provide instructional leadership and a language of caring; and have vision and courage, which counter-balanced most

principals' focus on achievement and standards embedded in their understanding of their roles (Friedman, 2001; Quigney, 1996). Very few studies are descriptive and ask the principals how they perceive their roles. The results of those studies reveal the following: In a study conducted by Newman (1990) among 59 principals of special education schools in the United States, the participants ranked their perceived roles as the following: curriculum planning, networking and communication with the various professional school members, coordinating with the school community inside and outside and finally mentoring teachers. Arick and Krug (1993) conducted a study among 1,468 principals of special education schools in the United States and the participants ranked their perceived roles as the following: instructional leadership, developing information systems at schools, evaluating school programs and communicating among school teams. Alper and Schloss (1996) found that the most important role mentioned by school principals was a strong collaboration with parents. A study done by Ronen (2003) among Israeli school principals revealed that the most important roles mentioned were instructional leadership, strong collaboration with parents and coordinating among professional staff members (school counselor, the school psychologist, the school nurse, the school doctor and other specialists). Richmond (2004) found that all principals articulated attitudes that were consistent with the philosophy of relational leadership. They were genuinely interested in what others had to say and they made time to listen. Zaretzky, Faircloth & Moreau (2005) found that the special education school principals perceived their roles as the following: the development of sound instructional and assessment practices linked to measurable goals, participating in placement and review committees' legislative processes, accessing and equitably distributing a scarcity of resources, nurturing relationships and networks within and beyond their schools and the development of effective mediation and negotiation strategies for interaction with parent advocates. When we compared these results to what is known from research about role perceptions of principals of regular schools, we found an important difference: the principals of regular schools attach more importance to their administrative and public-relation duties (budgeting, fundraising, marketing, controlling, coordinating), while special education principals attach more importance to their pedagogical roles (Ben-Arieh, 1998; Friedman, 2001).

Principals' perceived roles and job stress

School principals' job stress factors in regular education were investigated extensively. The main results emphasized the following factors: principal work loading, accountability, standards, responding to parents' expectations for student achievements, role ambiguity, budget cuts and teachers' low motivation (Friedman, 1997; Gaziel, 1993; Titleboim, Zweig & Schor, 2003; Whitaker, 1999). The few studies done among principals in special education revealed that special education school principals experience some different factors of job stress that affect their day-to-day work. The most common factors found in the literature were the following:

Work overloading (Dobbs, 1998): the school principal has to fulfill tasks which his/her counterpart in a regular school is free of: admission, selection and placement of students, following each student's work and behavior, being in steady communication with professionals regarding each student (social worker,

psychologist, teachers, nurse, parents, and local education supervisors) and controlling and coordinating the student body.

The heterogeneity of the student population: Different age groups from 4 to 21 and with various disabilities (Fuchs & Fuchs, 1995; Riffel, 1997; Vivinetto, 1990) attend special education schools. The school principal is expected—according to the 1988 Special Education Act—to build a particular educational program for each student according to the student's needs. This can include blind or deaf students or students with personality disturbances; the principal must help teachers develop pedagogical materials for the education of all students.

A long working day: While the principal in a regular school is usually expected to remain at school until 3 p.m., the principal at a special education school is mostly expected to stay at school until 6 p.m. (Antoniou, Polychroni & Walters, 2000). Besides his/her duties at school, the principal has other personal duties and play other roles, which can generate conflict and a stressful situation.

Different expectations from the educational staff from one side and the para-medical staff from the other side: both groups have different training and role perceptions and the principals have to maneuver among them.

Parents' expectations and demands (Alper & Schloss, 1996; Margalit, 1999): parents are expected to be involved in the education of their children, particularly if the school is for students with special education needs. The problem is that the there is a fine line between involvement and interference, which creates a perceived stressful situation. Margalit (1999) even argued that some parents expect the principal and the teachers to cure all of the discipline problems of their children.

Following the related research, the following hypotheses were formulated:

H1. It is expected that special education principals would perceive their main roles as instructional leaders, communicators and coordinators with schools agencies, while principals of regular schools would perceive their administrative roles as the most important.

H2. It is expected that principals of special education schools would emphasize heterogeneity of student population, work overloading, and parents' interference as the main job stressors while principals of regular schools would emphasize budget cuts, accountability, expectations for students' achievement and teachers' apathy as their primary stressors.

Because of the paucity of studies testing the differential effect of the demographic variables upon principals' feelings of job stress, we formulated the following research questions: (a) Are there differences among school principals of both categories in their stress level according to their differential ages and their job seniority? (b) How much do principals' perceptions of their roles affect job stress levels in regular and in special education schools?

Method

Sample

The sample was chosen randomly from the Tel-Aviv education district and included 152 principals of regular primary schools, 104 of whom responded (68%), while the principals of special education schools included all of the primary schools and 85 principals, 60 of whom responded (70%); this is quite a large percentage of responses in the Israeli educational context. The average age of the whole sample is

47 with a standard deviation of 7.33. The mean job seniority is 13 years. Regarding education, 62% have a post-graduate degree while 38% have an undergraduate degree.

Instruments

The subjects were asked to complete two questionnaires regarding their perception of the principal's role, constructed particularly for the present study. After that, 15 regular school principals and 10 special education school principals were asked in for an interview conducted by the investigators regarding what it means to provide leadership in education and how this leadership is demonstrated in the day-to-day management of education programs services and personnel. The subjects of both categories, regular schools and special education schools, were also asked to describe how they perceive their roles as school principals. A subsequent cross-case allowed for the identification of common circumstances shared by the participants as well as cases that remained unique to individual principals. The categories stemmed from the review analysis for the building of the perceived roles inventory for school principals. A test-retest reliability run among 30 in-service training principals of both school categories at Bar Ilan University revealed a mean r of .76 for the regular schools. Then, the principals had to note their perception, which was stated as, "I perceive my role to include the following," followed by a list of twenty activities. Subjects had to note their extent of agreement on a Likert-type scale (from 1 = completely disagree to 6 = completely agree).

The questionnaire yielded the following factors: (Items factor loading 0.40 and up).

Teaching planning and implementation (47% of the variance explained) included items such as the following: teacher in-service training, organization of the pedagogic council, supervision of curricula, introduction of new teaching methods, homework educational activities, initiating and planning of new curricula.

General management (24% of the variance explained) included the following: school maintenance, school aesthetics, teaching organization, organization of extra-curricular activities, budgeting, exhibitions and displays.

Human relations (15% of the variance explained) included the following: solving teachers' personal problems, solving students' particular problems, interpersonal relations in teamwork, interpersonal relations with the local education authority officer, interpersonal relations with the school inspector and the Ministry of Education officers, relationship with parents, delegates etc.

Extra-educational activities (7% of the variance) included items such as the following: activating the student council, activating pupil committees, activating extra-curricular circles, activating special educational events, selecting textbooks, planning teaching aids.

The second questionnaire was adopted from Friedman (1995). The perceived stress questionnaire included 33 statements regarding the factors putting stress on principals in fulfilling their job. The subjects had to answer on a Likert-type scale (from 1 = completely disagree to 6 = completely agree). The Alpha Cronbach reliability test yielded a mean r of .84.

A factor analysis run on the data with varimax rotation yielded the following factors:

Budget constraints (items 15, 21, 23, 24, 25) Alpha = .76. Explained variance = 9.34%.

Parents expectations (items 9, 10, 12, 26) Alpha = .76. Explained variance = 8.80%.

Work overload (items 6, 17, 18, 19, 20) Alpha = .65. Explained variance = 8.17%.

Problems with teachers (items 8, 11, 27, 29, 28, 29, 30) Alpha = .74. Explained variance = 7.53%.

Feeling of less support and loss of authority (items 1, 2, 7, 16, 32, 33) Alpha = .58. Explained variance = 5.85%.

Total variance explained = 39.69%.

Results

Principals' role perceptions in regular and special education schools

The significant differences regarding role perceptions between regular school principals and special education school principals is in the following variables: general management (M = 2.97, Sd = 0.85 versus M = 2.60, Sd = 1.00; t = 2.98, p < .01); human relations (M = 3.24, Sd = 1.11 versus M = 3.56, Sd = .93, 3.09, p < .01); and extra-educational activities (M = 3.62, Sd = 1.27 versus M = 3.08, Sd = 1.21; t = 3.06, p < .01). No significant differences were found between the two groups in the teaching planning and implementation variable (t = 0.25; p = n.s.).

Principals' job stress in regular and special education schools

The significant differences between regular school principals and special education school principals in their perceptions of work stressors are the following: budgets constraints (M = 2.95, Sd = 0.69 versus M = 2.64, Sd = 0.66; t = 2.86, p < 0.01); parents expectations from school (M = 2.48, Sd = 0.64 versus M = 2.17, Sd = 0.60; t = 3.075, p < 0.01); difficulties in teacher management (M = 2.49, Sd = 0.63 versus M = 2.22, Sd = 0.51; t = 2.81, p < 0.01). No significant differences were found between the two principal groups in work overloading (M = 3.75, Sd = 0.59 versus M = 3.64, Sd = 0.82; t = .988; p = n.s.) or feelings of loss of authority (M = 2.84, Sd = 0.60 versus M = 2.70, Sd = 0.52; t = 1.647; p = n.s.).

Job stress levels among subjects according to age and job seniority

The most stressful school principals in both groups according to age is the 30 to 44 age group (M = 2.45, Sd = 0.52), followed by the age group from 45 to 51 (M = 2.40; Sd = 0.56) and the age group 52 to 64 (M = 2.20, Sd = 0.37). The analysis of variance shows a significant difference among groups: F (2,150) = 3.784, p < .05. We receive the same picture when comparing the groups according to job seniority—the most stressful group is the new principals who have been at the job between 1 and 6 years (M = 2.58, Sd = 0.54), followed by the job seniority group from 7 to 11 years (M = 2.28, Sd = 0.54) and the job group who has been at the job 12 years or more (M = 2.24; Sd = 0.56); F (2,150) = 4.624, p < .01.

Job stress level according to principals' role perceptions in regular schools

In the regular schools the factors that most account for work stress levels among school principals are the following: general management (explaining 35.2% of the

variance) and then teaching planning and implementation (25.9%) and human relations at school (12.7%). The other perceived roles do not have any significant effect upon work stress level.

Job stress levels according to principals' role perception in special education schools

In the special education schools the factors most accounting for work stress levels among school principals are the following: teaching planning and implementations (explaining 27.6% of the variance) followed by extra educational activities (13.5%), and human relations at school (10.1%). The other perceived roles have no significant effect upon work stress levels.

Discussion

The present study was designed in order to investigate whether (a) principals of regular schools differ from the special education schools in their role perceptions (b) whether principals of regular schools differ from their counterparts of special education schools in their perceptions of work stress and (c) which role factors explain the work stress levels of both categories of principals.

Previous studies indicated that principals at special education schools attach more importance to their instructional roles such as monitoring teachers' work and human relations roles such as communication with staff, students and parents, while the present study shows that the main difference between groups is the administrative roles (general management), which is considered a more important role by regular school principals and less important by special education school principals. The principals of special education schools attach more importance to their human relations roles such as having intensive relationships with teachers, students and parents. The school principals have to lead a population that needs more care and treatment. In that population there are different categories; those students with intellectual disabilities and those with emotional and behavioral disabilities.

No significant differences were found between groups regarding educational planning and implementing curriculum. Both groups perceive that role as important. Regarding the extra-educational activities, the significant difference is not surprising because activating student councils or committees is much easier to do in a regular school than in special school. The results indicate that the first hypothesis was proven only partially. According to the second hypothesis, it was expected that principals of special education differ from their counterparts in perceiving the factors of their work stress. Previous studies found that both categories of principals have approximately the same work stress factors. However, previous studies also indicated that special education school principals reported that conflict among them and the para-medical staff and parents' interference are the main factors in their feelings of work stress. In addition, the heterogeneity of the student population due to having students of different ages or different problems at the same school puts a great work stress upon principals. Principals of regular schools are more stressed by work overloading, accountability, and parents' expectations than schools that have to deal with students' misbehavior. The present study shows that the main differences between groups in their perception of work stress are the budget constraints, parents' expectation from schools, and feelings of loss of authority. In

all these factors the regular school principals reported being more stressed than their counterparts, while in work loading no significant difference was found. Both groups reported that work overload is the most stressful factor. Finally, we may say that the second hypothesis was corroborated only partially.

Regarding the first research question, it was found that the younger principal and those with less experience in the principalship reported having more job stress, which is logically clear.

Regarding the second research question, results indicated the most work stress of the regular school principals is mainly due to the administrative duties and the pedagogical duties. School principals are less job stressed by interpersonal problems or conflicts. The situation is different in the special education schools, where school job stress levels are mostly explained by the teaching and planning and implementations of the extra educational activities and finally by the human relation aspects of the job.

These differences could be explained by the fact that the special education school principals are in charge of a special and vulnerable population, where para-medical staff and other professional groups are involved at schools. Every educational activity had to be coordinated with the school regular staff, with the professional staff such as the psychologist and the social worker and with the para-medical staff. School principals are less bothered by administrative work. Special education schools are small. Everybody takes care of the school and they have fewer budget problems. They could be defined as typical domesticated organizations. Meanwhile, regular schools are usually big schools, complicated with a lot of day-to-day management problems. Principals have to fight to have regular budgets, to respond to parents for students' achievements and to be accountable to the Ministry of Education officers; this is all in addition to their duties in running the curriculum and monitoring school staff.

Conclusions

The present study indicates that principals of special education have to accomplish different roles than their counterparts in regular schools; they experience different job stressors and for that reason they need different professional development programs.

Findings from this study emphasize the importance of training school principals in ways that fit their perceived roles. Special educational leaders have to be prepared mostly in instructional and human relations domains; namely, to monitor teachers' work, to enhance learning for an increasingly diverse student body with a wide range of needs and to guide teachers and additional school personnel toward school aims.

A great part of their preparation has to do with human relation skills, which are needed to fulfill their job duties. They need professional knowledge and skills to interact among a variety of specialists (Lashley & Boscardin, 2003). While principals who are required to administer regular education programs are also responsible for a broad range of duties, they are more stressed and concerned with their administrative duties. They need skills in budgeting, planning, organizing, staffing, fundraising and marketing.

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MULTICULTURALISM: CHALLENGE OR REALITY

Abstract

The paper analyses situations, conditions of social discourse and necessary actions for the implementation of multicultural education in the education system of the countries in transition (Republic of Serbia), from the perspective of interpretative paradigms. In the first part of the paper, the authors explain a theoretical understanding of the term multiculturalism as a public asset, and as the term which does not go in line of the traditional ethical principles. The second part of the paper focuses on the importance of creation of different conditions for the social discourse of the countries in transition in order to make the multiculturalism order not only the ethical option, but also the ethical need. In that sense, the basic thesis of this paper is that education, as a reference point, and the interactive relationship of individuals is the only possible way to understand the world in the continuous change.

Introduction

How to determine *other* and different? A perpetual and unresolved issue of human civilization has been imposed before our ancestors for centuries, and today, it has been posed to us, with the same power. Perhaps it should be recalled that a man has always had three possible reactions in relation to *other*: he could choose a war, isolate himself, or establish a dialogue. Throughout history, the man speculated among these three possibilities, and depending on the culture and era in which he lived, he could choose one of the three listed options. When a meeting with *other* would start with a conflict, it has usually leaded to a tragedy and a war, which produces only losers. Inability to agree with *others*, to be in their shoes, indicates imperfection of human beings and focuses on the question of human rationality. A desire of some people to build walls in order to get isolated from *others* has been called, in our time, the apartheid. With a lot of simplification, it is a doctrine, which proclaims that everybody can live as he/she wants, with a condition that he/she must be far from me if he/she is not my race, religion and culture. Similarly, the myths and legends of many nations present a belief that only "we who are our group", the members of our clan, and our society, are human beings - all the others are less than humans**.**

However, an image of *other* was completely different at the time of anthropomorphic beliefs, at the time when the gods had a human figure and when they were able to behave like persons. At that time, it was never known whether the traveler who was approaching you was a God or a man. That uncertainty or an interesting ambiguity was, in fact, one of the sources of the cultural hospitality, which ordered that a traveler or a visitor must be heartily welcome. The traveler's background was unknown and often inconceivable. The 'Greek culture' sheds a new light on the meaning and understanding of *other*, gates and doors do not only serve to remove *the other*, but also to open before him, and invite him to step over the threshold. A road is not necessarily the way which brings the enemy army; it may be the path that will bring some of our gods, dressed in the vestments of the pilgrims.

Emmanuel Levinas said that 'the event' is a 'meeting with the other' (Levinas, 1994), more precisely it is the 'basic event', because it is the most important experience that opens up the widest horizons. Levinas belongs to the "family" of dialogists, like the philosophers Martin Buber, Ferdinand Ebner, and Gabriel Marcel who have developed the idea of *other*, as a single and unique entity, starting from the positions which are the opposite to the phenomena characteristic for the twentieth century: a society of masses which cancels a diversity of individuals and ideologies which are totalitarian and destructive. These philosophers tried to preserve everything they considered to be of the top value: an individual. They wanted to save it from mass and totalitarian regime which destroyed every special identity: me, you, another, others. In this respect, their thinking was focused on the notion of *other* with a "big O", in order to underline the difference among individuals, as well as the difference among their individual characteristics, which were so different and so unique. This school of thinking had major implications on the former conception of a human being. It raised a human being and *other* as well, and as Levinas said: "... I have a duty not only to treat *others* equally and to keep a dialogue, but I must be responsible for them." (Levinas, 1994). Because of that, this school of thought criticizes the indifference and attempts of hiding behind walls, emphasizing the necessity of open positions, convergence and a good will as an ethical duty of every person.

The same stream of thoughts have developed the work and attitudes of the great anthropologist B. Malinovsky; a deciding point of his life and work was searching for the answers to the question: how to approach to the *other* if it is not a hypothetical and theoretical being, but the real one, and which, as such, belongs to another ethnic group, speaks another language, has different religion, different system of values, and which has one's own customs and traditions. In other words, it has one's own culture? (Malinovsky, 1989). Malinovsky went to the Pacific Islands in order to meet *other* and explore his/her way of life, his/her customs and language. Malinovsky wanted to see *other* with his own eyes and to be in his/her shoes. He wanted an authentic experience, not only in the contact with *other*, but as an authentic experience as *other*. After the research, he explained his not so pleasant experiences in *A Diary in the Strict Sense of the Term* (1989). Among other things, the author evoked memories on difficulties, despair, common languor and depression which he faced in a position of *other*. Following his authentic experience, Malinovsky has pointed out that all the other inhabitants of our planet are *others* against *others*, and that every person who is separated from his culture, willingly or not, pays a high price (Malinovsky, 1989). Therefore, according to him, it is very important to have cleared one's own identity, and a strong belief in the power and the value of personal identity. Only in that way a person can calmly face another culture. Otherwise, he will tend to hide, isolate himself, and be afraid of the reality that surrounds him. Malinovsky also pointed out another argument, which was very brave at the time: "There are no higher and lower cultures, there are only different cultures, which meet the needs and expectations of those who share, each one in its own way." (Malinovsky, 1989).

It has been said that the contemporary world is multiethnic and multicultural, not because the number of societies and cultures has increased, but because they speak louder, independently and decisively, demanding recognition of their true

values. All of this opens the way to the world which is so new, that the experiences acquired throughout history may not be sufficient to understand the world and find landmarks in it. However, it is certain that the world can be called a "planet of great opportunities" (Rorty, 1991). In both current and future world, we will always meet a new *other*; we will always have to try to understand and establish a dialogue with him/her. The *other* will always emerge from two mutually opposed courses of our reality which we have to be aware of and understand; from the course of liberal globalization, which uniforms our reality, as well as from the course which keeps our diversities, our originality and our uniqueness.

Multiculturalism in the countries in transition: a challenge or reality

In the world which is more and more multicultural, challenges of education also become bigger and more complex. As globalization process becomes more immediate reality for the inhabitants of the planet, a need to understand changes in the traditional vision of the community, nation and the state also becomes a growing necessity. One of the most important roles of formal education in many countries in transition is "modeling" of good, obedient citizens who share a common identity and who are loyal to the nation – the state (Toleubekova, 2010; Knezevic-Floric, 2009). And though it undoubtedly serves for an honorable purpose, and although it has been necessary in the certain social circumstances, in the most cases exactly that role has led to marginalization of many ethnic groups whose cultures, religions, languages and the way of life, which do not match with the, so called, national ideal. In this sense, in many countries in transition even today there are tensions between the functions and requirements of the education system and values, interests and aspirations of the ethnic groups.

Such a complex situation is a challenge both for the education system, and the educational and cultural policies of the state. In recent years, traditional educational policies of the countries in transition, based on the assumption of one national culture, have come under the public scrutiny. Today, more and more countries in transition tolerate and encourage the expression of cultural diversity, because the multicultural and plural-ethnic population represents an important stronghold of democratic social integration. In that sense, a true multicultural education will respect demands of global and national integration, and specific needs of culturally different communities, at the same time (Banks, 2004). As such, it is based on the philosophy of humanistic pluralism, since the humanism is the ethos of evaluation of social reality of the cultural pluralism. However, the values of humanistic and cultural pluralism, which are necessary for the multicultural education, are often not articulated in our transitional social reality; therefore, they must be "nurtured" in the educational process, which will be enriched with them.

The first step in knowing about the constantly increasing complexity of the changes and developments around us, as well as in the struggle against the feeling of insecurity caused by the changes, is the adoption of an appropriate knowledge and information, and their articulation in the time perspective with a constant critical approach and experience of reality (Beck, 2007). Therefore, it is obvious that education is the reference point that should help everyone to become citizens of the changing world; there is no way for an individual to understand his/her reality, if he/she does not understand the importance of relations with *others,* and if he/she

does not understand their social reality. It does not mean that the already overburdened educational programs (particularly in Serbia) should include another subject. On the contrary, it is necessary to reorganize the existing courses concerning the general settings on the interpersonal relationships in a concrete social reality, in order to apply the knowledge in the everyday life and work of the individual, and make it a base of the lifelong education process.

Solidarity means overcoming introspective inclinations to pay all the attention to one's own identity, and attempt to understand others by respecting differences (Rorty, 1991). For that reason, the responsibility of education of the countries in transition is necessary, but often problematic. Therefore, an important task of education is cognition, transfer of knowledge and awareness of individuals of their own roots, which would enable them to define their place in the world, and also teach them to respect the other different cultures. In that sense, some of the subjects are specially important, such as history, which contents have always been in function of raising the national identity, highlighting differences and emphasizing the feeling of superiority. Viewed from another angle, presentation of historical contents which point to understanding and recognition that peoples, countries and even continents are not equal, will force us to step beyond the framework of our immediate experience, and accept and acknowledge the differences among people, discovering that the other people also have their history and culture, which is just as valuable, rich and instructive as ours. Acquaintance with other cultures leads us, therefore, to the comprehension of the uniqueness of our own culture, but also to the comprehension of the historical heritage of a common human kind in general.

In addition, to understand the *others* allows us to better know ourselves. Any form of identity is complex, since the individuals have been formed (both personally and socially) in the interactive relationship with other people (Taylor, 1998). When we realize that there are other possibilities of belonging, besides narrowly limited groups such as a family, a local community, and a national community, we will be encouraged in the search for common values which can form the basis of intellectual and moral solidarity of the mankind. Therefore, education in the countries in transition has a special responsibility to build a new, mutually permeated social discourse. It must help the creation process of a new humanism, containing an important ethical principle, which gives an importance to acquaintance with and respect for cultures and spiritual values of different civilizations. The feeling of common values and common destiny is actually the foundation on which any form of international cooperation must be based. Enabling everyone to have an access to the knowledge resources, education has exactly this universal mission – to help people to understand the world and to understand the *others*.

The basic dilemma of the problems of multicultural education, which exists not only in the countries in transition, is the following: if the purpose of education is to encourage and develop features in each individual, which will make him/her similar to others, or the education is a process that provides the right to existence and expression of one's own features!? Similarly, it is certain that the process of mobility of people and ideas, and emergence of new information and communication technologies, have created new circumstances that hinder the individual to *grow up* into the independent and responsible person, which is the ultimate goal of the mission of all educational systems. The reaction to such a crisis

of identity, which is a consequence of these phenomena, is a fact that people are more likely to emphasize community identity based on ethnicity, nation, religion or the territory, what again obstructs the individual rights, freedom of choice and conscience, prudence and universality (Beck, 2007). These phenomena cause tension in relations among the nations-state-government-authorities-territory, becoming a great challenge to educational and cultural policies of the countries in transition, such as Serbia. In this regard, the efforts have been made to make a new concept - integration within a democracy, which will not impose a culture that would require from the members of ethnic communities to internalize the fundamental myths of their national culture. No nation has the exclusive right to values which are the cultural heritage of the entire mankind.

Taking into consideration a challenge of the new processes of collective identification and individual acculturation, schools must create knowledge and develop abilities necessary to the young people for the acceptance of universal things, not forgetting the roots of their own identity at the same time. For the harmonious development of the individual identity, 'personal' must be directed towards social, territorial, ethnic, linguistic and cultural origin, but also go beyond a situation called ethnocentrism. In other words, individuals must reconcile their social identity and freedom of choice of their own identity (the individual has the right to multiple identities) in order to understand the meaning of those identities in the contemporary society, include them in the wider world communities and treat them on the basis of two fundamental principles: one's own choice and freedom of conscience.

Conclusion

Since the educational discourse is most often caused by the requirements of the social discourse, the responsibility of the social community in the field of multiculturalism and democratization of education in general, cannot be ignored. It is probable that the responsibility of the society lies in the establishment of such an education policy, which will enable young people to develop and apply skills and competencies through experience. Those skills and competencies are necessary for synchronization of their individual rights with a general need to respect the rights of others. From the pedagogical point of view, it implies an attempt to understand particular and universal, complex and conflict, through interaction, and not only on the abstract level. According to J. Dewey, all of us have prejudices, and if someone claims that he does not have them, that claim is the worst prejudice (Dewey, 1971). The problem of intercultural education lays exactly in the fact that the prejudice of this type is impossible to neutralize with the rational approach. Therefore, probably, it is necessary to have new, concrete situations or well-arranged social steps of the policy of acceptance, which would prevent the previous causes of the problems in the relations between the society and the ethnic communities which belong to the society.

Such form of access requires a plan of cooperation with numerous partners outside the educational institutions, sine the educational institution can (and should) be the place where the pupils learn in practice how to be a citizen, under the condition of continuous development of skills for communication and responsible participation in one's own environment, as well as the ability for the partnership

relations and the teamwork with the *others* and different. Only in such a responsible social community, in such created educational policy and with the awareness of individuals that revealing of *others* is revealing of relations, and not the obstacle - it is possible to talk about policies of acceptance or about the intercultural education. In Serbia, which is a country in the process of transition, intercultural education is only a vision for now. The mission that lies ahead of it rests on Socrates' sentence that even after a bad harvest, it is necessary to sow.

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PRIVATIZATION OF HIGHER EDUCATION IN NIGERIA: CRITICAL ISSUES

Abstract

The broad intent of any educational reform is premised on the assumption that it is capable of improving educational process and practices, hence, the need for evaluation of the system's process in order to determine the efficiency and effectiveness of resource allocation. Education is capital intensive in terms of human, financial and material resources. Its provision and management determine the quality and functionality of the system. This paper sought to assess the extent to which privatization policy has actually addressed quality improvement and also verify if there is justification for private participation in the provision and management of tertiary institutions in Nigeria in an attempt to suggesting some quality improvement strategies. The rationale for deregulation and privatization of the sector was provided and the challenges in the policy were also highlighted. Based on this, it was concluded that though privatization policy enhances access, it is not a panacea to quality tertiary education. In addition, there must be a strict adherence to globally set criteria for improvement, enhancement of educational agencies, especially those in charge of management and supervision of tertiary institutions as well as regular reforms in the process and practice within the sector.

Key words: privatization, deregulation, decentralization, quality assurance

Introduction

The agenda of educational reforms of any nation is premised on the assumption that such reforms are capable of improving educational practices and process, and subsequently produce better citizens. This has therefore informed series of educational reforms in Nigeria which were aimed at improving access, quality and perhaps equity. Policies have been made on privatizing and decentralizing education at all levels as promoted by influential business roundtables and industrial advisory councils to education, such as the Council for Business/Higher Education Cooperation in Australia (Berman et al, 2003), as well as conservative think-tanks, such as the Centre for Policy Studies, the Institute of Public Affairs, and the Centre for Independent Studies in Australia; the Hillgate Group and the Institute of Economic Affairs in England; the American Enterprise Institute, and most recently, the Brookings Institute in the United States (Berman et al, 2003). Thus, privatization and decentralization of provision and management of education is a global issue. This paper attempts to assess the extent to which privatization policy has actually addressed the issue of quality assurance in the provision and management of tertiary education in Nigeria in an attempt to suggesting strategies for improvement.

However, functional and qualitative education is viewed as a condition through which development of a nation is attained. The level at which the door of education is opened to the entire citizens does not matter, but the kind of education offered to the recipients does. Education in both developed and developing economies is

capital intensive in terms of human, financial and material resources. Education in Nigeria today is a very big industry (Nwadiani, 2000). In support of this, Psacharopoulos (1985) asserted that, human capital is created and quality of human input in production is significantly improved by spending on education. This is why countries, particularly those with low per capital incomes invest such a large proportion of their budgets on education.

In the light of the foregoing, Ajayi and Ekundayo (2008) observed that Nigeria, which is one of the poorest countries in the world in terms of per capita income, needs to be assisted by the private sector, particularly, in the establishment and management of educational institutions; since the three tiers of government alone cannot cope with all the educational needs (Muhammed and Gbenu, 2007); as the national economic resources dwindled, it became increasingly difficult for government alone to meet adequately the financial obligation of all the sectors of the economy, mostly affected was the education sector (Shobowale, 1999). In support of this, Oshutokun (2006) reiterated that 'underfunding remains the major hindrance to the development of the nation's university sector'. As Utulu (2001) also pointed out, another thorny issue which could account for the decline in the higher education output in Nigeria is lack of physical facilities and the decay of available ones due to inadequate maintenance. Muhammed and Gbenu (2007) also noted that the universities in Nigeria particularly operate in adverse conditions, overcrowding and deteriorating physical facilities, shortage of library books, education materials, laboratory consumables and poor maintenance. In the same vein, Ejiogu (2003) remarked that a visit to the Nigerian universities will reveal the pitiable situation of higher education institutions: overcrowded hostels, classrooms with desks and seats for students, lectures without chalk or duster, cubicles as lecturers' offices, departmental offices without stationery and typewriters, lawns overgrown with weeds, blocked sewage system, as well as facilities and departments without a single toilet, among others.

The above shows that economic factor is one of the reasons why private sector participation in the provision of education is of obvious necessity.

Rationale for privatization of the higher education sector

Nigeria is a nation of 150 million people with 45% school age (primary, secondary and tertiary). Over 1 million candidates apply for admission to Nigerian higher institutions annually with only 13% being offered admission into the available vacancies in the existing institutions (universities, polytechnics and colleges of education). For instance, out of 1,046,940 candidates that applied for admission into Nigerian Universities in 2003/2004, 10.30% were offered admission. In 2004/2005, 838,305 candidates applied, 13.42% gained admission. While in 2005/20006, out of 917,960 applicants, 8.39% were admitted. Out of 912,350 candidates in 2006/2007, 12.94% were offered admission and in 2007/2008, 1,034,083 applied while only 4.59% were offered placement (National Bureau of Statistics, 2009). There are one hundred and seventeen (117) universities, comprising thirty-six Federal, thirty-six state and forty-five private. Specifically, in 2011/20012 academic session, University of Lagos was the most preferred first choice with 99,195 applicants but 6,106 (6.15%) were offered admission. This was followed by Ahmadu Bello University, Zaria with 89,760 applicants which admitted

6,068 (6.76%). University of Nigeria, Nsukka trailed with 88,177 and 5,970 (6.77%) were offered admission. This was the trend in most institutions in Nigeria. There are also 63 Colleges of Education and 75 Polytechnics in all (NUC, 2011). Obviously, the available public institutions are grossly inadequate for the need of the country judging by the demand for higher education in Nigeria. There is explosion in students' population in the existing tertiary institutions and the facilities are over stretched. Ayeni et al. (2005) remarked that poor quality, inadequate supply, distribution and lack of motivation of the teaching workforce are additional problems that the Nigerian education sector is faced with and these problems sometimes perceived to lie outside the scope of the educational system's internal mechanism. Furthermore, the dwindling financial resources, inconsistent educational policies and unstable systems, inadequate and untimely remuneration of the teaching manpower, lack of commitment and the brain drain syndrome are often flagged and noted as issues that affect Nigeria's educational sector, particularly, the tertiary institutions. The trend in the sector has been characterized by increase in enrolment without a corresponding increase in resources, equipment and facilities, frequent closure of schools, campuses and even suspension of classes. Additionally, it has been argued that in many secondary schools, quality has been sacrificed for quantity and the British Council (2004) claimed that such is affecting the university system.

Olaniyan and Adedeji (2001) affirmed that the main source of other problems facing education sector has been traced to the drastic reduction in both the actual and proportion of government's funds allocated to the sector, despite the UNESCO's recommendation of allocation of 26% of a nation's national income to the sector. It should further be noted that in as much as the education sector supplies trained manpower in form of accountants, teachers, doctors (medical, academic, veterinary etc.), lawyers, secretaries, etc, to the economy, there should be a reciprocal action from the economy to the education sector in form of provision and supply of enough financial resources.

Owing to the numerous problems being encountered as a result of underfunding of education sector which were stated above, the World Bank Report on Education Sector Strategy (1999) suggested three major ways of enlisting private sector participation in education so as to alleviate the burden of provision and management of higher education by the federal government. This is to enable the federal government cater for other social amenities. These ways are: First, selectively encouraging management and/or ownership of institution by Non-Governmental Organisations (NGOs), Communities or Religious group and entrepreneurs. Second, allowing students and their parents to choose among different options. The principle of choice implies taking a decision out of the so many available opportunities. Finally, requiring some levels of private financing of post basic educational levels, the private sector should be encouraged to finance education to any level they are opportune to do such.

Private institutions as alternative to public institutions in Nigeria

The word 'private' is a broad concept which includes religious, non-governmental organization-run, community-financed and/or for-profit institutions. In fact, large private school system exists in many developed and developing

countries, Nigeria inclusive. There are a number of institutions across the different levels of education ranging from pre-primary, primary, secondary to tertiary institutions that are run and managed by the private sector all over the world. The issue of private involvement in provision of education is not new at the primary and secondary school levels particularly in Nigeria. But it is only at the tertiary level that this is recent, with the emergence of Igbinedion University, Edo state, Covenant University, Otta, Ogun State and Babcock University, Illishan-Remo in the past ten years. However, one could conveniently say that the Nigerian educational system needs private participation in the provision and management of educational institutions because of the dynamic nature of education exacerbated by its inherent enormous resources required for the realization of national goals and objectives.

That aside, it is imperative to consider the constitutional base of private sector participation in the provision and management of Nigerian educational system. The constitutional base of the 1887 Education Ordinance which formed a milestone in the provision and management of education in Nigeria became pronounced in 1979, Section 36 sub sections 2 of the Constitution of the Federal Republic of Nigeria (FRN, 1979, 1989 and 1999). It asserts that, every person shall be entitled to own, establish and operate any medium for the dissemination of information, ideas and opinions… This shows that any Nigerian or group of Nigerians could establish and manage educational institutions, provided the requirements are satisfied.

According to Okojie (2010), the statutory framework laid down by the Federal Government of Nigeria for the regulation of private providers of tertiary education is fully encapsulated in Education (Minimum Standard and Establishment of Institutions) Act Cap E3 Laws of Federation of Nigeria 2004. Section 21 (1) & (3) of this Act provides that:

- Application for the establishment of an institution of higher learning shall be made to the Minister;
- In case of a University, through the national Universities Commission;
- In case of a Polytechnic or College of Agriculture, through the National Board for Technical Education;
- In the case of a College of Education, through the National Commission for Colleges of Education; and
- In any other case, through the Permanent Secretary of the Ministry of Education, in accordance with guidelines prescribed for making the application.

No person shall be granted approval to establish an institution of higher education unless the criteria set out in the schedule has been satisfied. At the schedule of this Act are the clearly set criteria that intending proprietors should meet before they can be granted approval to operate. These include:

- proper, well-spread and relevant academic structure; evidence of adequate current and capital funding; evidence of sufficient and adequate academic and support staff;
- full compliance of the staffing guidelines particularly the staff-student ratios prescribed for the various courses by the three regulatory bodies (NUC, NBTE, NCCE as the case may be); demonstrated sources of sustainable funding of the proposed institution with minimum prescription of

N200million for University, N100million for Polytechnic or Monotechnic and N50million for Colleges of Education;

- a well-laid out master plan for infrastructural and programme development; laws and statutes that shall not conflict with the conventional responsibilities in academic or interfere with avowed traditional institutional autonomy; well articulated mission and set objectives; and a credible administrative and academic structure; and
- the library, laboratory and workshop facilities, including instructional and consumables shall be adequate and there shall be long-range plans for sustaining them and proposed acceptable plans for linkages with similar institutions that can assist the proposed institutions to achieve its objective.

In order to properly implement the above criteria for approving tertiary institutions, the NUC as the appropriate authority vested with powers to process and consider applications for establishment of universities and degree-awarding institutions, set up and institutionalized 14 steps for processing applications for private universities. This is to ensure that institutions are provided and managed in accordance with the global trend.

Be that as it may, the pith and substance of the intention of the Federal Government is very clear, to the effect that private individuals or corporate bodies intending to establish private tertiary institutions must meet certain criteria that would translate to guaranteed quality assurance and sustenance of minimum standards (Okojie, 2010). He explained that despite the criteria set by the Federal Government of Nigeria, there are quite a number of illegal tertiary institutions. Okojie also pointed out that some of these providers did not establish their institutions through the established regulatory agencies, most and all the essential indices of academic standards are non-existent in their institutions.

The Executive Secretary of the National Universities Commission (2010) pointed out that four factors are responsible for the recent upsurge in the number of illegal providers of tertiary institutions in Nigeria. These include:

- The greed, fraud and the endemic rate of corruption in the society. The major motivational issue here is to corrupt the education system by providing substandard institutions in return for the fees they charge their students. These illegal providers are mainly driven by the greed to make quick money, without any desire to comply with the required prescribed regulations, which ordinarily demands more investment in the academic and human resources, together with infrastructural facilities.
- There exist the problems of insufficient access for the large pool of qualified candidates that sit for the yearly Unified Tertiary Matriculation Examinations (UTME) organized by Joint Admission and Matriculation Board (JAMB). As a result, these providers take undue advantage of desperate but unqualified candidates to attract them to their illegal institutions where entry requirements are usually less demanding.
- It has been discovered that a major factor that makes the illegal tertiary education, especially the universities, strive is that they have no set standard for anybody that can pay their fees. The NUC has therefore discovered that majority of their students are not qualified for entry into university or tertiary institutions.

- The non-existence of specific sanction for operating illegal tertiary institution without approval or licence has also contributed to escalation in the phenomenon of illegal provider of tertiary education, particularly the illegal degree mills. However, the National Universities Commission has proposed a bill to National Assembly through the supervising ministry, that is, Federal Ministry of Education, to criminalise and punish promoters and operators of illegal degree mills so as to deter potential violators (Okojie, 2010).

Ensuring quality assurance in higher education in Nigeria

Since higher education in Nigeria has not produced a critical mass of persons with the requisite genetic skills highlighted in the National Policy on Education through the domineering control of the Federal government, the following fundamental factors, which bedevilled the public institutions need to be addressed: unplanned expansion leading to a very rapid increase in the number of institutions since 1975; duplication of courses and programmes; poor state of infrastructure; inadequate teaching-learning and research facilities; overstretching of teaching, research and managerial capacities; over blotted student enrolment far above carrying capacity; an upsurge of various forms of unwholesome behaviours, such as examination malpractices, falsification of certificates, cultism, commercialization syndrome; internal and external brain drain among the intellectuals; and absolute loss of faith in the entire system by all stakeholders (see, for example, Ojo, 2007; World Bank, 2000; Okojie, 2010 and Oladipo, 2010).

Thus, privatization does not on its own provide qualitative education without requisite consideration for a total reform in the sector. According to Babalola (2007), five policy areas need further attention in Nigeria's tertiary education.

First, there is a dire need to review the philosophy, academic culture and purpose of tertiary education to include:

i.   making targeted investments in strategic areas of training and research,
ii. expanding the production of qualified professionals most required by local organizations and industries, and
iii. building capacity for managing and improving basic and secondary education.

Second, in an attempt to achieve the above objectives, all Nigerian tertiary institutions should focus on

i.   strengthening of governance by establishing boards with external representation
ii.   formulation of strategic vision based on the above
iii. embarking on curricular diversification
iv.   emphasizing science and technological development
v.   embarking on quality and relevance improvement
vi.   concentrating on expansion of equity mechanisms
vii. ensuring a sustainable financing, and
viii. development of ICT.

Third policy thrust concerns complimentary measures in order to ensure that tertiary institutions enjoy an environment that is conducive to teaching, learning, creativity and innovation.

Fourth, addressing unification of tertiary education structure in order to eliminate the distinction between the systems (university and polytechnic) in terms of input, (including finance and control), process (including type of research, curriculum orientation and assessment), output and how their graduates are being rewarded. To this end, all other tertiary institutions should strive to attain university status.

Lastly, re-engineering of the departmental approach to teaching and research, that is, shifting towards a problem-based mode of knowledge creation and away from the classic discipline-led approach, and the blurring of the distinction between basic and applied research. With the above review in mind, tertiary education in Nigeria will accomplish its goals irrespective of the ownership.

That aside, there is the need for review of the existing and development of sound/realistic National Policy on Education; establishment of reinforced supervisory/monitoring agencies; strict compliance with minimum qualification for teaching and non-teaching staff in the institutions; and increased allocation to the tertiary institutions among others.

Conclusion

Privatization and deregulation are the issues in vogue across the world today seeking to erode, eliminate or reduce government services with the goal of giving over as much as possible of the public services to private individuals, religious bodies, corporate organizations, foundations and other interested bodies. This involves the reduction of government authority and guidance (in the provision and management of education) and efforts to increase the autonomy of individual parents to control their children's schooling. It is evident that public institutions in Nigeria are losing their value at a fast rate as a result of poor funding, rising population, influence of politics, insufficient and deteriorating facilities, brain drain, among others, all of which have led to a decline in the quality of graduates of Nigerian tertiary institutions. In the light of this, the Federal Government of Nigeria has encouraged the participation of the private sector in the provision and management of tertiary education, first, to increase access, second, to improve quality and lastly to reduce the government involvement especially at this time of global economic recession. However, evidences abound that there is proliferation of illegal and substandard institutions across the country, all taking advantage of the opportunities of providing tertiary institutions.

Thus, as lofty as the benefits of privatization would have been in Nigeria, greed, fraud, corruption, misplaced priority, wrong value – orientation, inconsistent government policies, poor monitoring strategies and other vices that perverse the nation, have not made the policy to accomplish its goals just as the public institutions. Therefore, ownership of institutions is, though important, but fundamental factors which could enhance quality and relevance need to be seriously addressed. The National Universities Commission which is the main regulatory body of university education in the country should be reinforced for effective monitoring of the institutions and compliance with established standards. Similarly, the Federal Ministry of Education must be responsive to its statutory roles to achieve the goal of the policy.

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POLICIES AND INITIATIVES: REFORMING TEACHER EDUCATION IN NIGERIA

Abstract

Much discussion surrounding educational policy currently is international in character. Governments, policy makers, stakeholders and many international organizations of both developed and developing countries have become concerned with how policies, practices, and outcomes in one country can be compared with those in other countries. Comparative Education, as a subject of study, is more often found at the post-graduate than at the under-graduate level of university studies. Time is allocated for the introduction of the subject of Comparative Education. The field of Comparative Education is introduced in its historical perspective, and students learn about the few chosen foreign educational systems and institutions. In the teacher training programmes there is hardly any space and time left for the specific issues with which Comparative Education is also concerned, such as minority education, education of women, economics and politics of education, cross-cultural education, and others. It is felt, that the training of teachers should include important matters with which they will have to deal in their classroom, and which pertain to problems of social relations in the contemporary world. The contents of Comparative Education studies designed for the teacher training programmes should, include relevant anthropological-cultural studies, seeing teacher as boarder crosser, teacher as an inclusion, and teacher as purveyor of Human Rights. In this way, the Comparative Education would no longer be only an introductory, general informative course, but would better understand teacher education as to promote practice of sustainable development.

Keywords: Policies, Initiatives, Reforming, Teacher Education, Comparative Education

Introduction

In the field of education, comparative studies have become much more sophisticated and marked by a growing sense of urgency and practicality. This is mainly due to the fact that there are no longer satisfactory answers to educational problems within one country or within one discipline.

Comparative studies, however, are by no means limited to the field of education. It is now a common phenomenon in discipline like law, medicine, psychology, religions and so on. Comparative studies can no longer be seen just as a course in teacher's preparation; rather it has become a part of the daily business of governments, manpower planners, and social reformers and indeed of parents and students demanding a fair deal in education and a greater participation in national life.

In the United States, federal, state and even some district-level policy call for benchmarking the performance of its educational system with that of other nations. Many other nations are also engaged in the collection and use of data on the comparative performance of their educational systems, and using them as important inputs for policymaking. Aware of the increasingly cross-national competitive nature of current trends in educational policy making, nations of the developing

world, newly democratic countries, and post-communist countries are also looking to comparisons of educational systems to inform domestic policy making which Nigeria is not an exception.

Comparing educational systems is not new. As modern educational systems have arisen, a vast body of scholarship has also originated, comparing causes and outcomes of a variety of different educational practices and purposes. But what does it mean to compare educational systems? What kind of knowledge do comparative studies of educational systems provide? How do teachers and their work (as defined by UNESCO) educate the world? Looking at their policies and initiatives in reforming teacher education in Nigeria is the bane of this paper.

The meaning of comparative education

All human beings make comparisons; they compare their clothes with that of their friends. Sometimes children compare other peoples' appearances with their own people. When they compare, they relate two or more things or people together, and thereby point out their differences or similarities. From this view, one can simply define comparative education as a subject in which relationships between two or more systems of education are found. Some of the definitions of comparative education are as follows:

Dictionary of Education (1971) defines comparative education as a field of study dealing with the comparison of educational theory and practice in different countries for the purpose of broadening and deepening understanding of educational problems beyond the boundaries of one's own country. It is also the identification and diagnosis of educational problems, determinants, ideals and presuppositions in given societies with a view to interpreting them by cross-reference to similar elements in other societies.

Comparative education is a field that studies the educational similarities and differences prevailing within a particular society or culture or among various societies and culture. This is true of African societies, which had their own systems of education before the arrival of western education. Therefore, in our studies of comparative education, one can study formal western educational systems in relation to informal educational systems that are part of African culture, the two can be studied within the same society.

Reasons for studying comparative education

- It gives us wider knowledge about all aspects of education which include formulating educational aims, planning for programmes of study, and educational administration or counselling;
- It helps us to see how practicable some of our educational theories are;
- It helps us to be able to criticize and to judge our educational practices;
- Comparative education keeps us informed about what is happening in education in other parts of the world;
- It increases the understanding of our own educational system;
- It helps us to think of ways of improving our educational system, as to plan for the future of education of the country;
- It helps us to understand changes that have taken place in educational

practice in the past;
- It helps us to understand the social and cultural values of many societies; and
- It exposes us to the problems and achievements of education in other counties.

From the above reasons for the study of comparative education, one thinks of the origin of National Policy on Education in Nigeria that gave birth to the policy on Teacher Education.

Provision of teacher education in Nigeria

The National Policy of Education was born out of the National curriculum conference held in Lagos in September 1969. In 1977 the Federal Military Government issued the first white paper on the National Policy on Education which contained the recommendation of the 1973 national seminar on this subject, thus indicating that the Federal Government had accepted the recommendations in principle.

Teacher education is dealt with in Section 9, Paragraphs 57 to 82 of the National Policy on Education (1981) document. The document emphasises the importance of teacher education right from its opening paragraph, that is, paragraph 57, where it declares that:

> Teacher Education will continue to be given a major emphasis in all our educational planning because no education can rise above the quality of its teachers (FRN, 1981: 38).

Teachers are known to be responsible for the translation and implementation of educational policies. They also put into practice the principles of education. Every school child knows the teacher, so also, every parent, indeed, every member of the public if one does not know physically, hears of the teacher. This is because one cannot reasonably talk of the educational system without acknowledging the importance of the teacher in it. Teacher is the main stay of the educational system. Teacher promotes the teaching-learning process in various capacities as an instructor, educator, tutor, lecturer, counsellor adviser, researcher, innovator, exemplar, friend, parent, leader, and confidant and so on. As a result of these important and multiple roles teacher plays in the educational system, teachers' professional education requires careful planning and execution. True to type the history of teacher education in Nigeria is tied up with the efforts of experts in teacher education to fashion the best and most appropriate teacher education programmes for teachers in Nigeria at given periods.

The National Policy on Education provided a solid framework for such changes and challenges, yet much has not been achieved in teacher development in Nigeria. Bearing that framework in mind, the implementation of the latest teacher education programme is to be examined under the UNESCO Teacher as defined by UNESCO.

To enhance the quality of education therefore, provision should be made for the production of highly dedicated, devoted and competent teachers. This observation was probably considered in the formulation of the five objectives of Teacher education in the Nigeria National Policy document.

According to the policy document, Teacher Education aims at:
1. Producing highly motivated, conscientious and efficient classroom teachers for all levels of the educational system;

2. Encouraging further the spirit of enquiry and creativity in teachers;
3. Helping teachers to fit into the social life of the community and society at large and to enhance their commitment to national objectives;
4. Providing teachers with the intellectual and professional background adequate for their assignment and to make them adaptable to any changing situation not only in the life of their country, but in the wider world;
5. Enhancing teachers' commitment to the teaching profession (FRN, 1981: 38).

UNESCO has therefore decided to structure the Teacher Education Programme in such a way as to equip teachers for the effective performance of their duties.

UNESCO teacher: reforming teacher education in Nigeria

It is a know fact that globalization is increasing the diversity in our classrooms, altering the nature and rot of technology in the classroom, as well as changing the nature of work and of community life in which our students are engaged or will be engaged. In these "New Times" teaching and the teacher need to be redefined (Luke & Elkins, 1998). Luke and Carrington (2002) have called for a re-envisioning of education that moves beyond the nation state to consider the contemporary cosmopolitan, trans-cultural, transnational contexts and conditions of students and teachers in the 21st century.

As many readers are no doubt aware, the United Nations Organization (UN) includes a General Assembly currently representing 193 member nation states from around the globe. The United Nations Educational, Scientific and Cultural Organization (UNESCO) is a specialized agency of the UN. UNESCO represents one of the outstanding non-governmental organizations working to address issues of global improvements in a wide array of areas related to education. As such, it is appropriate to draw from their extensive body of work in education for this analysis.

UNESCO has a long history of initiatives, but at the present time its work in education is organized into seven themes: early childhood, primary education, secondary education, technical and science education, higher education, literacy, HIV/AIDs education, and teacher education. At this time, the major priority of UNESCO is "Education for All" (EFA) which involves the provision of free, compulsory primary education to everyone by 2015. This follows the UN Millennium Development Goals. UNESCO believes that education is key to social and economic development. UNESCO work for a sustainable world with just societies that value knowledge, promote a culture of peace, celebrate diversity and defend human rights, achieved by providing Education for All (EFA). In this section, attention will be on how teaching and the teacher is articulated by the UNESCO policies and initiatives in relation to recent scholarship on globalization and the development of the cosmopolitan teacher can be used to reformulate teacher education in Nigeria.

The UNESCO teacher: teacher as professional

Teaching should be regarded as a profession: it is a form of public service which requires teachers' expert knowledge and specialized skills, acquired and maintained through rigorous and continuing study; teaching calls for a sense of personal and corporate responsibility for the education and welfare of the pupils in their charge.

Teachers should have the most direct impact on the day-to-day educational experiences of children because it is "their task to translate national policies into practical action in each school" (UNESCO/UNICEF, 2007: 93; cited by Harper and Dunkerly, 2009: 59). Yet, despite the centrality of the teacher to realizing UNESCO goals expressed through national initiatives, teachers are conspicuously absent from many locales for reasons ranging from safety issues for female teachers, to lack of teacher education, to conflict and displacement. This shortage of teachers and the shortage of trained professional teachers in particular, is a severe limit to the advancement of education locally and globally.

There should be the global identity of the teacher's functions as a universal yardstick against which the local teachers and schools can define themselves. Future research should focus on how teachers and schools name themselves. As indicated by UNESCO, the attainment of professional status may require considerable 'capacity-building' in some countries. In support of this increasing capacity building, the Nigerian Government should offer a number of initiatives and several specific publications; like Capacity Building of Teacher Training Institutions; and Teacher Professional Development as was initiated by UNESCO (cited by Harper and Dunkerly, 2009: 59).

Teacher as border-crosser

As evident in the development of the 2005 UNESCO document "Guidelines for Quality Provision in Cross-border Higher Education" the need for global or international standards, guidelines and transnational or supranational organizational structures concerning teachers and education is increasing. In the case of cross-border higher education, the UNESCO document indicates that since the 1980, the mobility of students, teachers, programs and institutions has grown considerably, together with new delivery modes and cross-border providers, such as campuses abroad, electronic delivery of higher education and for-profit providers. This creates challenges concerning quality control and accreditation that cannot be met by national frameworks (UNESCO, 2008: 8). Cross-border teaching speaks to the need for a more robust frame of globalization to better address circumstances of 21st century teaching and learning. Implicit in these guidelines is the notion that the teacher will be subject to and defined by the supranational organizations and structures that would determine accreditation quality practices, and fair credentialing.

Teacher as purveyor of human rights

The nature and specific work of the global teacher, is evident in the UNESCO/UNICEF documents on EFA, most notably in UNICEF's "A Human Rights-Based Approach to Education" (2007). This UNICEF document names the teacher as a professional with specific "rights" and particular responsibilities in relation to the teaching of human rights. Rights of the teacher are named explicitly, "Teachers are entitled to respect, remuneration and appropriate training and support, and they cannot fulfil their obligations to children unless these rights are realized." (UNESCO/UNICEF, 2007: 72). These are understood as the rights of a professional, which aligns with documents on the status of the teacher.

Inclusion

As part of the emphasis on education as a right of the child, inclusion is an important theme in the UNESCO documents. According to UNESCO's Guidelines for Inclusion, inclusion is seen as:

> ...a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education. It involves changes and modifications in content, approaches, structures and strategies, with a common vision which covers all children of the appropriate age range and a conviction that it is the responsibility of the regular system to educate all children. (UNESCO, 2008: 8).

Teachers are ultimately the ones who bear the burden of this responsibility: "effective inclusion involves implementation both in school and in society at large. It is the regular teacher who has the utmost responsibility for the pupils and their day-to-day learning" (UNESCO, 2008b: 12). UNESCO indicates that countries need to define principles and practical ideas with regard to inclusion. These then can be interpreted and adapted to the context of individual countries (UNESCO/UNICEF, 2007: 65). The Nigerian government and ultimately the teacher should work from the foundation set by UNESCO and its member states. The articulation of inclusive education is an imperative.

Working in the context of rights-based education, the Nigerian teacher is to ensure that educational practice is:

> child, respectful of all children, that the school and classroom culture ensures no discrimination of individuals or groups of individuals in respect of admission procedures, treatment in the classroom, opportunities for learning, access to examinations, opportunities to participate in particular activities, such as music or drama, or marking of work... Teachers need to take active measures to involve girls on an equal basis with boys (UNESCO/UNICEF, 2007: 95).

Redefining teacher education

Teacher education needs to be redefined. Teachers must become skilled in not only content, but also in context if child, rights-based education is to be realized. Within the framework of a human rights-based education, teachers, children and parents are to be involved in developing policies to ensure a school culture of respect and inclusion. Moreover teachers are encouraged to ensure local engagement with schools and that schools are responsive to local contexts "Within a framework of core standards and principles, individual schools should be able to adapt to the needs of the local community and provide a relevant curriculum that takes account of local concerns and priorities" (UNESCO/UNICEF, 2007: 96; cited by Harper and Dunkerly, 2009: 61). The Nigerian teacher is specifically named in relation to the work she is to undertake and the training she will need at the local level. She is to be responsive and engaged in the local context in meeting the UNESCO global initiatives.

The UNESCO teacher is to promote and practice sustainable development. In 2005, the United Nations declared a Decade of Education for Sustainable Development for which UNESCO serves as the lead agency. This declarator defined Education for Sustainable Development (ESD) as providing students with the learning opportunities; that involve learning and respecting past global achievements while caring for and preserving our resources for the well being of all world citizens. It emphasizes the need to educate children to be caring citizens who exercise their rights and responsibilities locally, nationally and globally. Nigerian Teachers should not be left out in this sustainability.

While the documents referring to education for sustainable development may not be as numerous as those dealing with teacher education or human rights, they provide a focal aspect of the role of the teacher and education in UNESCO's world-view that is no less compelling. A Decade of Education for Sustainable Development Quarterly Update (July 2008) states emphatically the role of ESD: It constitutes the comprehensive approach to quality education and learning.

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LEADERSHIP IN EDUCATIONAL INSTITUTIONS

Abstract

Many questions concerning quality of functioning and effectiveness are connected with the management of education as a professional field in educational organizations. The role of educational leadership in an educational organization raises many questions related to legislative regulations of activities, issues of institutional placement, educational partnerships, and learning processes. Tests presented in the paper deal with the processes within two action groups separately, which may be associated with better communication and social outcomes. Quantitatively, the study included 108 participants, taking into account the subjects in the school staff who had previously conducted action research. Examining relationships between the phenomena have attributed characteristics to them. A Hi - quadrate test examined the frequency of the perceived discrepancies: the school researched and the staff chronological age, their qualifications, their area of activity (class, subject teaching, or high school), work experience, and communication training based on NLP techniques.

Respondents were an important factor in explaining trust in leaders (director), but not in the expected problems, expertise, and competencies of the organization's employees and their work. In other words, the less confidence in the leader of the school means less confidence in the entire school system and its operation.

Key words: educational leadership and management, NLP, communication

Introduction

Every attribute of an analysis system illustrates the specific management and leadership in which the process of decision-making is conducted. Directed rigidity is the consequence of the curriculum rigidity. Rigidity is in direct correlation to the old fashioned but still characteristic concept of education by which the educational process needs to be organized and controlled, it does not come out of this process. The educational regime in Croatia did not succeed in one of its basic tasks, enabling and stimulating users' personal growth (pupils, students, and teachers). In 2001, the Organization for Economic Cooperation and Development – OECD analyzed the situation in Croatian schools and found that the Croatian school system is too centralized in the field of finance and management and in determining and implementing the curriculum. On the other hand, the evaluation of activities is not centralized. Complete decentralization is present in the field of evaluation of work quality (www.oecd.org/dataoecd/44/53/33691596).

It seems that playing an important part in a teaching role is very far from leaders' 'main' function which is leadership as a part of management. The primary function of leaders is to manage and lead the organization (regardless of the level of work, small group, class, parallel class, school, municipal district, a nongovernmental organization, bank, ministry…) towards meeting the goals of the

organization. Leadership differs in the content and purpose of leadership, but also in the way of leadership.

In this context quality can be seen as the need to bring the Croatian Qualification Framework (CQF), to consider the implementation of school programmes for the evaluation of learning outcomes which are linked to labour market needs. Learning outcomes and a unique and powerful system of quality assurance are key elements, which will be based on the development of evaluation and recognition of formal and informal learning within the CQF (http://public. mzos.hr/Default.aspx?art=9850&sec=3304). In the process of leadership, it should effectively and responsibly direct the resources and implement authority based on shared values between the authorities and the public, so citizens can call the government to account and thus provide service in their interest (Mužić, 1979; Mijatović, 2002; Jurić, 2004).

Tests presented in this paper stem from the demands of the roles which subject/teachers perform and on the basis of which they will, as participants, be trained to perform the competencies which are essential for successful leadership of the teachers. The framework uses the techniques of Neuro Linguistic Programming (NLP), which have so far been proved useful, successful and in a short time - efficient. The model changes as new applications are investigated. It is wide and its concepts are drawn from modern biology, psychology, learning skills and learning, linguistics, computer science, religions (O'Connor, Prior, 2002; O'Connor, Seymour, 1995.). This paper analyzes the evaluation of professional development activities on the attitudes of teachers and assistants. For this part of the problem, analysis will be directed towards methods of quantitative analysis.

The research is directed towards redefining the concept of knowledge in knowledge-based competencies, quality leadership, and managing the improvement of communication skills in educational institutions.

Objectives and Tasks

The **objective** of this study is to **assess the impact of teaching on the attitudes of the respondents according to leadership experienced in educational institutions.**

Research goals were achieved by realizing the following **tasks:** the emancipation of participants in activities, determining the impact on teachers' teaching, in their views about the system, relationships teacher - parent and teacher - pupil.

Respondents

The study included 108 participants, taking into account that the respondents and staff are employees of two primary schools in different areas of the SD County. Several respondents had previously participated in the qualitative reflexive - action research in a series of modular custom made pedagogical workshops and the second part of the respondents were their colleagues who were not been involved in the reflexive – action part of the research. The respondents in this study consist of two groups of teachers and professional assistants from schools included in the research (after referred to as teachers), participants in qualitative research, who will be

introduced to the techniques of communicating that should be incorporated into practical action in all spheres of life.

In gender configuration 88 women and 20 men were tested, which reflects the actual gender bias in employees in primary schools. Age structure is covered by the categories from 21 to 65 years. Most respondents are of the chronological age of 41-45 years. Older age groups dominate the respondents from 46 years to 60 years. The research covers 46 subjects with a university degree, 58 subjects with a college degree, and 4 subjects with high–school diploma that corresponds to the age of the respondents and the history of legal regulations required for work in primary schools.

The largest group of respondents have many years of experience, more than 31, therefore they are pre-retirement teachers. By looking at the annual records of school covered by the research, it is evident that the staff members of schools that participated in the study were mostly from groups with long years of service 21-30 years and in some cases more than 30.

Research Methods

Contents of the action – reflexive practicum, in which one part of the respondents previously participated voluntarily, apply to the methods by which leadership achieved in educational institutions.

The hypothesis in this paper refers to the assumption that the attitudes of respondents, who have had some teaching about NLP techniques differ from the attitudes of teachers who have not undergone training in management. The first section consists of 6 questions, which provide answers to the structure of personal variables such as gender, age, education, the frame of work activities, years of work experience and professional development relating to the acquisition of communication skills by using techniques of NLP. The second part is a Likert-type scale consisting of 5 degrees of frequency and 39 claims. The obtained positions are described as completely integrative constructs. The results were processed by SPSS STATISTICA 5 program and SPSS 9.

Results

The results of this study showed that the attitudes of teachers with less experience differ from those of teachers with greater experience, for example, teachers of older age groups consider more than their younger colleagues that the relationship between parents and teachers significantly affects a child's upbringing and as well as a belief that they have knowledge of all the problems in their classroom.

In order to verify the basic assumptions about the multidimensionality of test cases, the factor analysis (FA) was used, employing the principal component, which extracted three statistical significant factors. Before interpreting the obtained results, the existence of three different factors was assumed. The difference relates to the variables that describe the factors 'independence', 'relations' and 'external control'. From the purified results the factor 'external control' had the most variables correlated with variables that are supposed to describe the system. This means that teachers who were included in this research describe the variables associated with

the education system as 'external control'. Most of the variables, which should describe the teacher - pupil relationships together with other variables, describe the 'independence' factor. The resulting matrix was subjected to an appropriate orthogonal Varimax transformation. Nine variables are highly saturated with the factor 'independence' whereas the same allegations have low and negative values to describe the other two factors. The factor 'independence' describes variables that are – it is easier to work with pupils than with parents, willingness to seek help outside the school and 'avoiding conversations with the headmaster'. Distribution of frequencies of the variables confirms the thesis that relations between teacher - pupil are very highly connected with regard to the 'independence' factor.

Most statements describe the second factor called 'relations'. The line of variables in this factor can be arranged in three levels of importance. The first level describes the relationship teacher - pupil, the second level describes the relation parents - teachers. Gained factors are highly saturated and describe ways of hiding emotions, i.e. minimizing the indication of emotion. The third part of this factor connects with (self-) assessment of teacher competences. This factor includes the description of interpersonal intelligence as the ability to understand other people's motives. The third factor is called the 'external control' of which the most expressed variables describe relationships with parents effecting the core of the problem and emphasize the need for reorganization of meetings with parents and 'dissatisfaction with the cooperation of parents and schools'. Representatives of this factor described it as obedience of students and the centralized welfare final decision making, that is by transferring responsibility to someone else - in this case the headmaster. Highly emphasized are variables with inadequate influence of school to family situations, but also those on the absence or violation of rules and protocols, and the impact on the emotional area of subjects.

Results of Hi – quadrate test

X2 showed statistically significant deviation of perceived frequency due to the **school** in which research took place in the assertions: (Parents bring innovation in our school). X2 is 0.018 <0.05 and (We are a happy school). X2 is 0.046 <0.05.

According to the chronological age, X2 showed statistically significant differences. Teachers of older age groups agree more with the statements – 'The relationship between parents and teachers significantly affects the education of children' and 'I know all the problems in my classroom' than teachers of younger age groups.

By qualification X2 showed a statistically significant difference in the claims 'I avoid conversations with the headmaster' (X2 = 0.00), which means that teachers with lower qualifications are less willing to talk with the headmaster than their colleagues with higher education. The claim 'I am not always consistent in educational practices' X2 = 0.024, teachers with university degrees are more accepted than teachers of high school education. 'The final decision resolving the problems in our school are decided by the headmaster.' and 'Teachers do not know how to fight for an appropriate status', X2 = 0.00.

X2 by sex showed statistically significant differences in claims in which respondents easily identify pupils' feelings of male respondents (X2 = 0.027). Female examinees respect more children's desires and needs than men (X2 = 0.40).

According to education - participation by respondents in the previously conducted action research X2 resulted in statistically significant differences in their responses in comparison with those who had no earlier involvement with the research.

Analysis of variance (ANOVA)

ANOVA results indicate statistically significant differences in attitudes between teachers involved in the action groups and those who were not involved, in all variables. Respondents strongly indicate the importance of leaders of organizations (headmaster), and not the expertise and competences of employees and their work. In other words, less confidence in the leader of the school results in less confidence in the entire school system and its operation.

Discussion and Conclusion

In the educational process, managers or persons who manage are located at all levels (pupils in classroom in the context of working with small groups, teachers, parents as partners, principals, counsellors, ministers). The effectiveness of the overall management structure is based on the effectiveness of individuals, teams, institutions, and the system. Leadership is one of the functional areas of management, based on the personal abilities of individuals, of which, for this work at managerial level, managerial skills, and managerial style are especially significant (Juric, 2004). The primary determinant of learning is teaching the teacher communication skills in order to acquire competence in leadership. Regardless of the objective(s), a person who wants to convey a message tries to make the message clear and logical so that the recipient could receive it. Technical problems are related to communication between employees and customers, parents and pupils which get in the way of successful motivation.

The extracted principal factors: relationships, autonomy, and external control describe success in relations as resulting from the willingness to adapt to unavoidable changes. The results and deviations of observed frequencies showed statistical differences between attitudes taking into account the work environment (schools) that are included in the study, chronological age, qualifications, work experience, gender, and participation in the previously conducted action research. ANOVA results indicate statistically significant differences in attitudes between teacher participants involved in the action research and those who were not included.

Hi – quadrate test showed statistically significant differences by gender, age and education. This was related to participation in a reflexive action research, and that learning communication skills in order to control the upbringing and education process is essential and is the underlying mechanism for overcoming institutional inertia and the factor that determines the pace and direction of development in the knowledge economy in education as part of lifelong learning.

The conclusion is that knowledge about leadership and management skills can be transferred beyond the classroom and integrated into authentic everyday activities that will be in a dyadic relationship between implementation and performance 'in' and 'from' the class team environment.

Knowledge and leadership skills can be the same for two similar educational organizations, but there remain differences that arise from their use in the environments in which they operate. Human resources are important, and the people, their skills, knowledge, abilities, uniqueness, and diversity within the educational system of the organization form a special identity that cannot be copied. Leadership is a process that affects other people, inspires, motivates, and directs their activities to meet the expectations of the group.

Long-term persuasion and continuity requires internalization of change - understanding that the new behaviour fits into a personal value system. The participants of this action research were people who had volunteered; which implies their desire for change. Effective management of the educational system increases the willingness of organizations to cope with challenges. The results of this study importantly emphasize teachers' attitudes where confidence in a leader is more important than the personal competence and the personal activities and work of teachers. In other words, the less confidence in the leader, the less confidence in the organization; this leaves only personal responsibility. Leadership always involves a person of influence, who chooses the way of personal control, to encourage others, but also the prevention of diversion into the unknown.

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Part 4

Higher Education, Lifelong Learning and Social Inclusion

JAMES OGUNLEYE

VALIDATION OF SKILLS, KNOWLEDGE AND EXPERIENCE IN LIFELONG LEARNING IN EUROPE

Abstract

The paper examines systems of validation of skills and experience as well as the main methods/tools currently used for validating skills and knowledge in lifelong learning. The paper uses mixed methods – a case study research and content analysis of European Union policy documents and frameworks – as a basis for this research. The selection of the case study countries was not scientific, but based partly on geography and partly on similarities in national systems of vocational education and training or in the general application of lifelong learning policies. The paper finds variations in the systems of validation across the European Union region; and there seems to be an absence of coherence and comparability in the practices and systems of validation within and between member states. The paper offers an original contribution to, and a fresh insight into, our understanding of the tools for validating learning in the European Union region.

Keywords: systems of validation, skills, knowledge, formal, informal and non-formal learning, qualification

Validation of skills and knowledge in Europe

The systems of validation vary across the European Union region to such an extent that there is now in place European guidelines for validating non-formal and informal learning (Cedefop, 2009). In the United Kingdom, the recognition and validation of competences and qualification – in relation to workers – are assigned to the Sector Skills Councils. More generally, skills and knowledge are validated through the National Qualifications Framework, which shows the relationship between nationally-recognised qualifications; it aims to promote access to education and training and lifelong learning 'by helping people to understand clear routes or progression … avoid unnecessary duplication and overlap of qualifications whilst ensuring all learning needs are covered' (DfES, 2003, p.13). A common route for validation is the National Vocational Qualifications (NVQs), which was set up principally to meet the needs of employers, but the qualification can also be used as a basis for applying to college or university for further education. The NVQ adopts

a competence-based approach to assessments and qualifications; this means that to gain an NVQ award, a candidate must provide evidence of how competent s/he is at performing a set of duties or prescribed tasks at work or, in some cases, in a simulated work environment, while meeting a set of performance criteria set down by the relevant Industry Lead Body. NVQs candidates are assessed by observations of performance; by assignment, project work and simulation. Even though the emphasis is on competent performance, accredited bodies may also assess underpinning knowledge via 'Central Assessment' or 'External Examination'. The Republic of Ireland operates a similar, competence-based approach to assessments and qualifications, where skills and knowledge are validated, and certificated following a candidate's successful documentation/compilation of portfolio evidence (see DES, 1998; see also Ogunleye, 2011). As with the UK vocational education provision, certificates are available in a range of vocational areas such as administration, customer service, construction, health, social care, child minding, hairdressing, and beauty therapy. Also as practise in the UK, there is an embedded system of *Accreditation of Prior Experience and Learning* which enables skills and competences acquired through non-formal and informal learning to be validated via portfolio evidence, and certificated via the national vocational qualifications framework.

France operates a policy of 'no-discrimination' in relation to skills validation irrespective of the settings in which the learning took place. It is now possible to validate knowledge and skills acquired on the job as well as those acquired in non-formal and informal learning settings (Ogunleye, 2011). The new system of assessment and validation (*bilan de compétences*) allows individuals – or those working in the public, voluntary or private sectors including craftsmen and tradesmen – to identify their competences and aptitudes and have these assessed with a view to obtaining a full or partial vocational qualifications such as the state-designed national vocational diploma qualification or sector-based professional qualifications. An OECD (2005, p.21) report indicates that thousands of people over the years have obtained 'a certification by the recognition of their professional experience' and an equal number of individuals have obtained full or partial certificates since a new system of validating knowledge, skills and on-the-job experience was introduced. There is a framework for accrediting *prior* achievements; this was developed partly to encourage other groups such women and unemployed adults to join or return to the labour market (Gendron, 2001), and partly to address the high level of unemployment in the economy (see also Colardyn, 2004). Neighbouring countries such as Germany – and to some extent Austria – have varying systems of validating skills or knowledge gained in formal and non-formal learning, but it is unclear how informal learning is integrated in the national qualifications framework.

Bulgaria has a general framework for developing standards for vocational education and training; the aim is to provide vocational education and training for the labour market. Knowledge and skills gained in formal and non-formal learning are validated by a broad range of licensed formal and non-formal education and training institutions including the centres for vocational training run by the Bulgarian Chamber of Commerce and Industry and the Bulgarian Industrial Association (see Dumitrescu, 2005). Vocational centres provide assessment

framework which set out competencies; they also assess, validate and certify skills and knowledge acquired in the training. In neighbouring Romania, there is a developing mechanism for recognising and validating knowledge and skills acquired in non-formal settings following the adoption of competence-based approach to defining occupational standards. The aim is to link 'employment and learning specifications' (Com, 2004a, p.18); sector-specific occupational or training standards have been defined and progress is being made to integrate assessment outcomes in the training standards. Work is reportedly underway to integrate formal and non-formal learning in compulsory education, where learner assessment takes into account learning acquired through the formal settings (via end of cycle tests) and those gained in both non-formal and informal settings (via portfolio evidence). Similarly, learning acquired by adults in non-formal settings can be assessed against occupational standards and validated through certification by the state-supported Regional Adult Training Centres occupational assessment centres (European Training Foundation, 2004). It is hoped that learning acquired informally by unemployed persons can also be accredited by the occupational assessment centres – to remedy the absence of connections in the national qualifications system between formal and informal learning. Skills and qualifications are at the heart of Poland's policies on vocational educational and training and lifelong learning, according Polish Ministry of Economy and Labour (2005), but a coherent national system of validation is yet to develop. However, there are local and industry-based skills assessment and validation systems in operation; an example of a local initiative is the Polish Association of Craft, which has 'competence to examine young workers after they have completed their practical education at company level' (UEAPME/UNICE, 2006, p.87). Large Polish employers have their own systems of competence validation.

In Norway, non-formal learning setting such as the workplace is promoted as a 'venue for learning,' where 25-30 per cent of young people received their vocational training (UEAPME/UNICE, 2006). Competence Building Programme (KUP), a state supported initiative, offers a platform for recognising and validating learning in the workplace. KUP also provides the tools for documenting competencies acquired through informal and formal learning. Sweden has well established systems of validating skills, knowledge and experience gained in formal, non-formal and informal learning settings. The aims of validation are to 'further social justice and make it possible to gain access to higher education,' and to 'offer equal possibilities for groups that traditionally have difficulties accessing the education system'. To that end, a mature student with no formal education, non-formal and informal learning can still access higher education by virtue of his or her 'relevant practical experience,' according to an OECD (2005, p.16) review of the national qualifications systems in the EU region. This suggests that Swedish higher education institutions recognise the three forms of learning activity as a basis for further education. It should be noted that the validation of learning that takes place outside the university is a joint responsibility of the education systems and the labour market. Finland is known to have the most developed 'seamless' system of skills validation settings in Scandinavia: every individual has the right to have their competences (skills and knowledge) assessed and accredited if necessary. Although not a Scandinavian country, skills and knowledge gained through non-formal and

informal settings in Denmark can be accredited/assessed and validated within the context of work-based training and vocational education for adults. 'It means that an adult with experience within a specific area of work can have his or her informal qualifications [real competences] assessed and compared against the formal goals for a vocational education' with a view to gaining a formal recognition and certification (UEAPME/UNICE, 2006, p.41).

Mediterranean countries such as Spain and Greece have systems of accreditation and validation in relation to learning gained in non-formal settings such as the workplace. In Spain, for example, there are (national) working groups covering industry sectors that are charged with defining training needs, competence standards and qualifications; hundreds of occupation-specific qualifications have been defined under the new system of national vocational qualifications. However, there is a relative absence of a process/procedure for validating and recognising skills and knowledge gained in informal learning. In Greece, there is a legal framework for recognising and validating competences and qualifications via the National System of Education and Training linked to Employment or ESSEEKA (UEAPME/UNICE, 2006). Skills and knowledge are accredited and certified depending on how they are acquired. The state, through the Ministry of Education and Religious Affairs, is responsible for the certification of qualifications acquired in formal education, but professional organisations, associations or agencies are responsible for providing and accrediting vocational education and training – or non-formal learning – under the supervision of the relevant government ministries such as Labour and Social Affairs, Agriculture, and Development. It is unclear what system of validation exists, if any, for skills and knowledge acquired in informal settings, according to a review by the National Accreditation Centre for Continuing Vocational Training and Organisation for Economic and Co-operation Development (EKEPIS/OECD, 2003, p.4; see also Georgiadis and Zisimos, 2010). The EKEPIS/OECD review found that skills and knowledge acquired in informal learning through courses offered by organisations such as trade associations, chambers of commerce, and social partners, for workers and unemployed adults 'in the context of lifelong learning do not result in any accredited qualification certificates.'

Methods, systems and tools used in validating skills and knowledge

The European Commission has sought to develop common European principles for validating non-formal and informal learning in vocational education and training and lifelong learning. These principles are organised into six largely overlapping themes of: *purpose of validation, individual entitlements, responsibilities of institutions and stakeholders, confidence and trust, impartiality and credibility and legitimacy.* A key aim of the common principles was to ensure a 'greater comparability between [and compatibility of] approaches in different countries and at different levels' (Com, 2004b, p.2). The Commission believed that common principles will enable existing – arguably – fragmented validation methods, systems and tools to be 'linked and combined'. One suggestion is that the EU adopts a European Qualifications Framework for lifelong learning as a basis for comparing national qualifications (European Trade Union Confederation, 2004), but other stakeholder groups such as the employers' organisations see strengths in the

diversity of the existing approaches in Member States; they believed the current arrangements offered greater flexibility.

There is, at present, an implied acceptance that the methods and tools currently used for validating formal learning – examination, assignment, project writing, presentation, etc – are broadly *fit for purpose* in relation to formal education in Member States. The focus, therefore, is on non-formal and informal learning. At the European level, methods, systems and tools for validating non-formal and informal learning are broadly standardised or similar; these include EuroPass Portfolio, EuroCV, Euro Language Portfolio, Computer Passport and Active Citizen Course. An EU-sponsored *Joint Action Project* on the recognition and validation formal, informal and non-formal education (see Davies, 2006) undertook laboratory testing of a range of tools in a dozen European countries including UK (England, Wales and Scotland), Norway, Finland, Czech Republic, Finland, France, Greece, Italy, Lithuania, Portugal, Romania and Switzerland. The study examined and tested assessment tools/methods in vocational training, adult education, higher education (universities) and youth/voluntary sector including Portfolio, EuroCV, Euro Language Portfolio, Computer Passport and Active Citizen Course. The study found an absence of rigorous quality assurance in the current practices: for example, there were inadequacies in the existing assessment tools, some of which 'do not provide adequate space [for the candidates] to present all the learning from a wide range of contexts and situations overtime' (Davies, 2006, p.4). In addition, some assessment tools were clearly unable to meet the needs of all the target groups. The study also found a tendency for the assessment tools to focus more on the past thus lacking 'a prospective element where people can set their request for recognition or validation in the context of a personal and professional development plan.'

Conclusions

From the foregoing study, there is evidence of continuing progress in the development of systems of validation of skills and knowledge acquired through non-formal and informal learning in the EU, although there are variations in the state of national development of the validation systems. This variation reflects largely the state of development of social and economy-supporting institutions and the history of vocational education and training provision in the individual countries. In some countries such as France, Finland and the UK, there is a history of continuous development of systems of skills validation that are clearly linked to national qualifications frameworks. Other countries such as Greece and Spain are catching up, although the validation of skills and knowledge acquired in informal learning do not as yet result in accreditation. New EU countries such as Poland, Romania and Bulgaria are only beginning to develop systems to validate skills and knowledge acquired through non-formal learning; however there is still an absence of connection in the national qualifications frameworks between formal and informal learning. The challenge for the EU is how to achieve coherence and comparability in the practises and systems of validation within and between member states.

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EMPOWERING WOMEN WITH DOMESTIC VIOLENCE EXPERIENCE

Abstract

It is generally held that it has been only recently that domestic violence gained appropriate attention as a major social problem. However several approaches, drawn from different theories are applicable in explaining the origin of this negative phenomenon. It is well recognized that trauma of domestic violence has destructive impact on somatic and mental health as well as on quality of life. Different screening instruments are available to identify women who have been abused but no studies to date have evaluated the effectiveness of screening to reduce violence or to improve women's health. Public education and police and social worker home visits showed that neither intervention affected service-awareness or service-use scores of individuals who experienced abuse. The aim of this paper is to share with educators and mental health workers some ideas how lifelong learning combined with empowering approaches might help women with domestic violence experience increase their knowledge, coping strategies and self management as well as achieve wellness and social inclusion in their everyday lives.

Introduction

"*Violence against women is a manifestation of historically unequal power relations between men and women, which have led to domination over and discrimination against women by men and to the prevention of the full advancement of women...*"

> The United Nations Declaration on the Elimination of Violence against Women, General Assembly Resolution, December 1993.

However it is a common expectation that family relationships are the sources of emotional support, that home is a place where individuals seek love, safety and shelter, there is evidence that these relations are sometimes tense and result in feelings of despair, anxiety and guilt because of experience of domestic violence. Giddens (2004) defines domestic violence as physical abuse directed by one member of the family against another or others. A clinical or behavioural definition is: a pattern of assaultive and/or coercive behaviours, including physical, sexual, and psychological attacks, as well as economic coercion, that adults or adolescents use against their intimate partners (Schechter, Edelson, 1999). Heise et al. (1999) reviewed nearly fifty population-based surveys from around the world and reported that 10% to 50% of women were physically assaulted by their husbands or partners during lifetime. In the majority of the incidences physical violence was also accompanied by psychological abuse. In western countries it is estimated that about 25% of women experience intimate partner violence over their lifetimes (Council of Europe, 2002). In WHO multi country study (Garcia-Moreno et al., 2006) the prevalence of physical and sexual violence varies internationally from 15% to 71%. Gracia (2004) points out the phenomenon known as the "iceberg" of domestic

violence – the most of the cases of domestic violence are unreported. That means that the prevalence data reports only a very small part of the problem when compared with the real life situation.

Although much has been learned in recent years about the epidemiology of violence against women, information about evidence-based approaches in the primary care setting or in the local community for preventing domestic violence is seriously lacking. There is a lack of evidence regarding the effectiveness of interventions for women experiencing abuse and that potential harms of identifying and treating abused women are not well evaluated (Wathen, MacMillan, 2003). Why is it so that home, which is supposed to be the safest place, so often hosts violence? Gelles and Straw (1979) identified the following factors that may contribute to explanation of high incidence of domestic violence:

- many hours of the day spent together,
- vast range of activities over which conflict can occur,
- intensity of involvement,
- impinging activities,
- implicit right to influence the behaviour of others,
- high level of stress,
- culture conflict caused by age and sex differences,
- lack of competences to fulfil culturally assigned roles.

The last but not least factor is the cultural norms legitimizing the use of violence within family. Physical assault performed on non-family member is recognized as a violation, whereas the very same act directed at a family member is not sanctioned.

Theoretical framework of domestic violence

Several approaches, drawn from different theories are applicable in explaining the origin of domestic violence. A sociological perspective places this phenomenon within a macro model of society; domestic violence is seen as an outgrowth of social factors. A psychological perspective accounts for violence within a micro level of society; therefore it is attributed to such intra-individual factors as aggressiveness, impulsiveness etc. From the perspective of individual psychopathology theory domestic violence is caused by dysfunctional personality structures that might be developed in childhood. Wife batterers may demonstrate inadequate self-control, sadism, antisocial personality types and undifferentiated types of mental illness (Hamberger and Hastings, 1986; Fals-Stewart et al., 2005).

Social learning theory suggests that children observe actions of their significant others and learn which behaviour, even if not socially accepted, awards the agent with desired effect and at the same time is not sanctioned. In the study of Bandura et al. (2006) conducted in the group of pre-school children the results revealed that subjects observing aggressive adults model performed aggression in the absence of the model significantly more frequently than controls. Moreover, boys presented with more aggression than girls after being exposed to male model. According to this theory, it can be concluded that domestic violence is a learned behaviour which is sanctioned neither by families nor by the society. The most controversial is systems approach, mainly due to neutral attitude towards violence and the underlying assumption that each individual in the system is equally responsible and

powerful (Murray, 2006). It is based on an assumption that family is consisted of individuals which all contribute to the interactions that occur. For example feedback provided by one member of the family may trigger the actions of another member of the system. Thus, domestic violence cannot be analyzed without including the context and dynamics of the relationships in the family.

Feminist theory underlines the role of gender and power imbalances. In patriarchal societies, structural factors inhibit equal participation of females in public life and these inequalities are accordingly reproduced at family level. Men benefit from free domestic labour provided by women and use violence as one of the means to confirm and maintain their supremacy (Giddens, 2004). As much as all the theories of domestic violence are diverse and analyze this phenomenon from different angles, they also share common observations. It is agreed that it has been only recently that domestic violence gained appropriate attention as a major social problem and its core is yet to be understood as this is a complex that little can be done to addressee this problem as long as domestic violence remains a publicly accepted behaviour (Wolfe, Jaffe, 1999). The crucial assumption is to change the social conditions that breed, facilitate, and maintain all forms of violence against women and children. One way is the struggle of the women's movement "the private is political", other is consciousness-raising and building competent communities (Harris et al., 1997; Walker, 2009) or implement certain procedures on the local basis.

So far from the primary care perspective, there are two main intervention options to detect and to prevent violence against women. Primary care clinicians can screen women to determine if they are being abused or are at risk of abuse and they can refer abused women to various intervention programs. However different screening instruments are available to identify women who have been abused; no studies to date have evaluated the effectiveness of screening to reduce violence or to improve women's health (Wathen, MacMillan, 2003). Public education and police and social worker home visits showed that neither intervention affected service-awareness or service-use scores of individuals who experienced abuse. A series of studies conducted in the United States pointed out that the effectiveness of arrest as a deterrent for recurrent domestic violence showed mixed results. Finally, an initial study of the use of civil protection orders and an innovative pilot study of legal advocacy and counseling showed promising results that these legal interventions can reduce physical abuse (Wathen, MacMillan, 2003).

The empowerment concept

The concept of empowerment originated in social psychology (Rappaport, 1981, p. 15): ..."By empowerment I mean that our aim should be to enhance the possibilities for people to control their own lives."...

The empowerment theory includes processes and outcomes (Perkins and Zimmerman, 1995). The description involves different level of analysis: individual, organizational and community. Empowering strategies are focused on capacity-building for groups and individuals (Zimmerman, 2000). Empowerment compels us to think in terms of wellness versus illness, competence versus deficits and strength versus weaknesses (Perkin and Zimmerman, 1995). It defines help in a positive way; it gives hope and it is based on strength approach – identification of capabilities as

well as resources. It is also very important to remember that empowerment calls for an empowerment-oriented language, the professionals is here a facilitator, not an expert.

Psychological empowerment refers to the individual level of analysis. It integrates personal control, proactive approach to life, engagement in community, critical understanding of socio-political context, hence we can distinguish its three components: intrapersonal, interactional and behavioural. When we are working to enhance empowerment outcomes we should provide settings that facilitate shared leadership, skill development, growth of a group identity and participation (Zimmerman, 1995). Outcome of individual empowering process should be seen as gaining (Zimmerman, 2000). These would include:

- sense of control,
- critical awareness,
- participatory behaviours.

It also seems valuable to acknowledge the underlying assumptions of psychological empowerment (Zimmerman, 1995). These would take:

- different forms for different people,
- different forms in different contexts.

Empowerment perspective in interventions for women with domestic violence experiences

Trauma of domestic violence has destructive impact on somatic and mental health and wellness – hence quality of life. Many women with these experiences have serious psychological problems – they face post traumatic stress disorders (PTSD), depression, anxiety, phobias, current harmful alcohol consumption and psychoactive drug dependence (Coid et al., 2003; Fischbach and Herbert, 1997; Humphreys and Joseph, 2004; Roberts et al., 1998). Some authors describe the pattern of mental health problems as the "symptoms of abuse" (Humphreys and Thiara, 2003). A study comparing children of battered women and refugees of war found significant similarities including sadness, anger, confusion and PTSD. The study concluded, "these studies provide convincing evidence that the effects of violence exposure are not transient or temporary but may endure over many years" (Berman, 1999, p. 60). Domestic violence survivors often experience social trauma being blamed, stigmatized and excluded with related negative effects on economic capacity (Lindhorst et al., 2007). The percentage of abused women reporting interference from their abusers with their efforts to obtain employment, education or training ranges from 15% to 50% (LaViolette and Barnett, 2000).

Judith Herman found that domestic violence victims want condemnation for the offence, which they recognized as an attempt to degrade and dishonour. What they were looking in the aftermath was therefore "the restoration of their honour and reestablishment of their own connections with the community" (Herman, 2005, p. 585).

Women with domestic violence experience often report: low self esteem (Shields and Hanneke, 1983), low self efficacy often seen as learned helplessness (Walker, 1989), difficulties in dealing with negative emotions (Hajdo, 2007).

The empowerment interventions concerning domestic violence should address all its levels – individual, organizational and social. Regarding the individual one the

trainers should have in mind specific and complex needs of domestic violence survivor taking into consideration increase of her knowledge, coping strategies and self management as well as achieve wellness and social inclusion in everyday life. Tailor-made empowerment intervention usually equips the individual with an instrument of self-determination, provides competency awareness and strengthens self-esteem. Sometimes it triggers the decision of disclosure which might be a starting point to abandon abusive relationship. Being a training group member, they can learn from each other, give and gain support, exchange information and share experiences. However, to be effective, we believe that empowerment training should be tailor-made and should contain modules on self-esteem, assertiveness, relaxation and personal wellness plan.

Conclusions

It is generally held that it has been only recently that domestic violence gained appropriate attention as a major social problem. However several approaches, drawn from different theories are applicable in explaining the origin of this negative phenomenon. It is well recognized that trauma of domestic violence has destructive impact on somatic and mental health as well as on quality of life. The idea of empowerment directed at vulnerable and socially excluded domestic violence survivors is ideal as it might help women to gain control of their lives and instil in them motivation to reclaim their position in the community.

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ALOY EJIOGU & SHEIDU SULE

SIXTY-FIVE YEARS OF UNIVERSITY EDUCATION IN NIGERIA: SOME KEY CROSS CUTTING ISSUES

Abstract

This paper traces briefly the history and development of university education in Nigeria from one university in 1948 to a total of 118 universities as at the time of writing the paper. Besides the chronicle, the paper examines some cross-cutting issues that tend to scuttle the otherwise good intentions and robust programme initiatives of the universities to excel and match the best practices evident in world acclaimed universities. Such issues include: the ad-hoc manner in which most of the universities were/are being established; inadequate funding; crisis of access; brain-drain; instability of academic calendar due to strikes; liberalization of university ownership and graduate unemployment. The paper concludes by calling on both the government and all stakeholders to seriously tackle the issue of funding as it is a veritable catalyst for excellence in any university system.

Introduction

Although Nigeria as a nation came into being in 1914, it was not until 1934 that the first form of higher education institution, Yaba Higher College, was established in the country. Its establishment was sequel to a realization by Mr E.R.J. Hussey who was the country's colonial Director of Education that:

> the number of Europeans in posts in Nigeria, not only of senior but also of junior ranks, was very large and that situation could not continue indefinitely. Indeed British personnel were performing duties which already in other countries in Africa were being performed by Africans.
>
> It was obviously necessary to start an institution which in the first instance would be a "Higher College" and develop in due course into a University. (Hussey, 1959:91)

Hussey was also of the opinion that although no limit would be set to the scope of the institution, it may take a long time before it reaches the standard, which must be its ultimate aim, that of a British University (Hussey, 1930:29-31).

A University College is Born

In 1943 the British colonial government set up an *Asquith Commission* to consider the principles which should guide the promotion of higher education, learning and research and the development of universities in the country. An outcome of the Commission's report was a recommendation for "the creation of a university college in an area of approximately five square miles on the outskirts of Ibadan" (Ejiogu, 1986:51). Consequently, in May 1947, Dr Kenneth Mellanby of Cambridge University, England was appointed Principal of the University College Ibadan (UCI). In July 1947 Mellanby arrived Ibadan but saw "no college, no building, no student body, no staff, no governing body" (Mellanby, 1952:2). The

only physically identifiable aspects of the university college was Dr Mellanby himself. By January 1948, staff and students of Yaba Higher College numbering 13 and 104 respectively were absorbed into the university college as a college of the University of London. That meant that graduates of the college would receive degrees of the University of London; for as Mellanby (1952:4) recalled:

> A brand new college cannot enjoy the status of an established university until it has time to show its merit. If degrees were from the outset granted at Ibadan, neither in Nigeria nor in the world at large would their holders be recognized as the equate of men and women holding degrees of established universities.

By this special relationship agreement, the University of London determined the college's syllabus, examination schemes, setting and grading of question papers, and the ultimate award of degrees to UCI students. This arrangement persisted till 1963 when U.C.I. attained a full university status as the University of Ibadan (UI).

The University College Ibadan was criticized by some Nigerian nationalists for its overt colonial orientation in staffing and course offerings. Dr Nnamdi Azikiwe, a foremost nationalist, speaking in the Nigerian House of Representatives, nicknamed it "a million dollar baby" because of what he termed the college's "financial irresponsibility", arguing that whereas between 1948 and 1953 the average cost per student each year at U.C.I. was between 1,800 and 2,830 US dollars, the average cost per student in U.S.A. were approximately, 835 US dollars (Ejiogu, 1986). The Action Group party also frowned at the idea of tying the college to the dictates of London University, arguing that:

> Our political independence would be a sham and at best incomplete if the control of much of our intellectual life remained in foreign hands and the policy of our premier university college is decisively influenced by bodies established outside the country (Taiwo, 1980: 97).

The Emergence, Growth and Development of Indigenous Universities

The University of Nigeria, Nsukka

In spite of the apparent success of U.C.I. (Ejiogu, 1986), the Nigerian elite clamoured for a full-fledged "African" university. The opportunity came in 1954 when, Azikiwe as the Premier of the Eastern Region led an economic mission to Europe to, among other things, "make arrangements for facilitating vocational higher education in Eastern Nigeria". The Mission recommended the establishment of a university in the region. According to Azikiwe and Ojukwu (1954:32-33):

> In order that the foundation of Nigeria leadership shall be securely laid, to the end that this country shall cease to imitate the excrescences of a civilization which is not rooted in African life, we recommend that a full-fledged university should be established in this Region…. Such a higher institution of learning should not only be cultural according to the classical concept of universities, but should also be *vocational in its objective and Nigerian in its content.*

It was also recommended that the University should take off with six Faculties (Arts, Science, Law, Theology, Engineering and Medicine) and 22 Institutes: for hitherto unfamiliar disciplines (Ejiogu, 1986). Modelled after the land-grant colleges of U.S.A., it was hoped that these institutes would help in the transformation of the lives of the people of the Region. Besides, the university should be so structured as to make it possible for those wishing to combine studies with their regular work to do so.

Thus emerged on October 5, 1960, the University of Nigeria, Nsukka (UNN), **deliberately designed** with a somewhat different perspective from that which had hitherto characterized the idea of a university in West Africa. From its very beginning,

> the University enunciated its first commitment to a philosophy that provides for the broadening of higher education whereby it can be fully equipped to offer courses in such branches of learning as are related to agriculture, business and industry without excluding the classics, the arts and scientific studies. (UNN, 1965:11)

Ashby Commission Universities

In anticipation of indigenous manpower needs of a soon-to-be independent Nigeria, a Commission was set up in April 1959 under the chairmanship of Sir Eric Ashby of Cambridge University, U.K. to conduct an investigation into Nigeria's needs in the field of post-school certificate education over the next twenty years. Among the Commissions recommendations were that: a university should be established in Lagos, the capital city, with emphasis on evening and correspondence programmes; a university should be established in each of the three regions (North, East and West); each university should be autonomous and independent in the conduct of its affairs.

The Ashby Commissions recommendation led to the establishment in 1962 of Ahmadu Bello University, Zaria (North); the University of Lagos (Capital); and the University of Ife (West). The East was already had its own University of Nigeria Nsukka, established in 1960. These, together with U.C.I. which attained fully fledged status in 1963 as the University of Ibadan (U.I.) and the University of Benin established in 1970 for the newly created Mid-west region, are known today as the first generation universities.

In the Third National Development Plan (1975-1980), the Federal Military Government of Nigeria established by fiat seven universities, namely: Universities of Calabar, Ilorin, Jos, Sokoto, Maiduguri, Port Harcourt and Ado Bayero University, Kano. These are the second generation universities.

The third generation universities were those established between 1980 and early 1990. They are: the Federal Universities of Technology situated respectively in Owerri, Makurdi, Yola, Akure and Bauchi. Also established during the period were state (regional) universities of Imo, Ondo, Lagos, Akwa-Ibom, and Cross River States. Nearly all of these started operations from make-shift/temporary campuses.

The fourth generation universities are those established between 1991 and the present date, most of them without adequate planning, nor feasibility studies. Today, Nigeria has 118 Universities (36 Federal government-owned; 37 state/regional controlled; and 45 private owned).

Key Cross Cutting Issues

Challenges of Access and Carrying Capacity

A total of 118 universities might seem too many for Nigeria. Considering however the country's large population of over 160 million people, the number of universities may not be too much after all. However numerous studies (Nwadiani, 1991; Oyebade, 2005; Oyebade & Keshinro, 2005, Moti, 2010) confirm the inability of the universities to meet the ever growing demand for higher education by Nigerian students. Over the years, less than 20% of qualified candidates gain admission into the universities. Between 1999 and 2008, for example, admission rate as percentage of total qualified candidates fluctuated between 18.8%; and 5.2%; (Moto, 2010; Federal Republic of Nigeria (FRN), 2009). This obvious irony of having so many universities and still too few students enrolment is attributed to the universities' low carrying capacities.

By carrying capacity is meant that the number of students to be admitted must be determined by on available adequate teaching-learning facilities; infrastructure, and standard teacher-student ratio. Since 1999/2000, the universities have respectively exceeded their respective carrying capacity/admission quota by over ten percent. In spite of such apparent excess, over 80% of qualified candidates cannot find a place of study. In acquiescing to the mounting political pressures of social demand for access, the system has been compelled to expand in number, such that between 1980 and 1992 eleven universities were established by the federal/central government, most of them seemingly on an ad hoc basis (Saint, Hartnett and Strassner, 2003).

Inadequate Funding

As Coombs once observed, "national educational systems have always seemed tied to a life of crisis. Each has periodically known a shortage of funds, teachers, classrooms, teaching materials – a shortage of everything except students" (Coombs, 1968:1). This scenario is still very true of Nigerian universities. There is still a growing financial squeeze on the entire national educational system. In a study, Ejiogu (1997:125-132) reveals an abysmally poor funding of universities in 1975-1990, during which universities received less than 45% of their respective budget estimates each year, in spite of the urgent need to cope with growth in student enrolment. Even the Federal Ministry of Education, (FME) lamented on this situation, saying:

> Evidently funds allocation to the Federal Ministry of Education has dwindled over the years. Funds release for capital projects was as low as 0.01% of approved allocation in 2002. Release of recurrent allocation was 85% of approved allocation. (FME, 2007:283)

Federal government of Nigeria's allocation to education as a percentage of its total annual budget since 1999 has never exceeded 13% which was the highest recorded in 2008 (Olawale, 2010:1).

Ironically the paltry sum allocated to the ministry for funding education is never released in full. Coombs (1985:137) was right when he states:

> What seemed true in 1968 is no less valid today. Organized educational systems do not run on slogans and good intentions.

> They run on money. Not that all the problems of education can be solved by throwing money at them. But without the money to secure the essential physical resources of education (buildings, equipment, materials, supplies) and the human resources (teachers, administrators, custodians), organized educational systems would collapse onto an empty center. With money, the nonfinancial problems of education become more tractable.

Such is the plight of the Nigerian university system in which the federal and state governments go on opening up new universities with unmitigated recklessness; inadequate funding to sustain the existing ones, and establishing new ones without any infrastructure in place nor funds to provide for same. The private universities may seem to be doing better in terms of funding and infrastructure, but the very high fees which they charge students make their accessibility herculean. On the contrary the Federal governments, for partisan political reason, abolished payment of tuition fees in its universities-while asking them to source for funds to augment whatever "handouts" they receive from the government.

Brain Drain

A fall out of inadequate funding of Nigerian universities is the "brain drain" phenomenon. It refers to migration of academics, skilled professionals and high technical manpower away from the Nigerian university system in pursuit of self-actualization, whether in universities or in other employments outside Nigeria. Even young academics refuse to return to the country after their studies abroad; brilliant young graduates opting for careers in more financially rewarding sectors of the economy, rather than pursue higher degrees in preparation for employment as lecturers.

"A large proportion of university staff still in the employment of Nigerian universities do not devote their full time to their jobs because of their efforts to "make ends meet" (FME, 2007:185). This phenomenon is generally attributable to such "push factors" as pitiable and eroding salaries and allowances, derogatorily called "starvation wages; unsatisfactory working conditions; inadequacy of support staff; lack of up-to-date teaching and research facilities; social unrest; and discriminatory appointment and promotion practices. It was so bad that between 1997 and 2009 the number of academic staff declined by 12%. In fact the unabated spate of brain drain has left the universities with less than 48% of its estimated staffing needs achieved. Worst affected in short fall are Engineering 73%; Medicine 65%; and the Sciences 53% (Olufemi, 2000).

Instability of Academic Calendar

Before 1980 Nigerian universities operated a relatively stable academic calendar. With time a downward pressure on staff salaries and debilitating working conditions constrained both staff and students to embark on incessant strikes. In 1972 the University of Ibadan closed down for over three months due to students' riot over alleged poor feeding; the University of Lagos students rioted over the introduction of a national youth service scheme (NYSC) and the school was shut for four months. In 1978 university students all over the country rioted over government increase of cost for a student's meal from 50 kobo to 1.50 naira. The Academic Staff

Union of Universities (ASUU) went on strike in 1981, 1986, 1994, 1995 respectively, each time agitating for improved conditions of service. Their non-teaching counterparts embarked on a 3-month strike in 1996 demanding for parity in salary with those of the teaching staff. In 2001, 2002 and 2003, ASUU went on strike (each for 3months) against inadequate funding of the universities by government; disparity in salary, lack of autonomy, non-payment of allowances, and early retirement age (Okwa & Campbell, 2011). Even as this paper is being prepared, the over eighty public / government universities are shut due to ASUU strike over the same issues that have been lingering since 2001. Amazing, between 1993 and 2012, public (government owned) universities were closed for a cumulative total of 177 weeks due to ASSU strikes (Bamiro, 2012:58). These incessant strikes continue to paralyse academic activities, prolong duration of courses and consequently disorientate students and lecturers alike.

Not only do these frequent strikes in public universities exacerbate the brain drain phenomenon, Okwa and Campbell (2011:303) reveal that 80% of the respondents in their study "choose private institutions because of frequent strikes in public institutions".

Liberalization of University Ownership and the Aftermath

For more than five decades provision of university education in Nigeria was the preserve of the government, (either federal (central) or state). By 1999 it dawned on the government that it alone could not provide equal access to higher education for its youth. It therefore decided to divest its stranglehold on university education. In 1990, Nigeria's first two private universities emerged, namely: Igbinedon University Okada and Madonna University, Okija. Today, there are 45 of such private universities in Nigeria.

One would expect a less stressed and more productive university education system as a result of the liberalization. The essence of liberalization, argues Worika (2002), is competition and hence expectation of high yields dividends or profits from investment. It would also imply the sale of knowledge to the highest bidder. With such a "sale of knowledge" education would no longer be a public good. It would result in lowering of standards, and arbitrary award of high marks as a means of attracting enough students. Regretably, the emergence of private universities has not made the desired impact on access to higher education. As Okebukola (2002) observes, there is already a wide disparity in placement of candidates between public and private universities, attributable not to the size of the universities but mainly to high fees payable in those private universities. Access to such private universities would be skewed in favour of children from richer homes. As Osagie, cited in Bamiro (2012:50), says, this situation "represents some form of class problem as high fees result in denial of access for children of the working class and the lower middle class".

Conclusion

Available records and literature (Federal Ministry of Education, 2007) report that the training which present-day graduates receive is inadequate and that their performance on the job is equally less than acceptable. And yet, ironically, Nigerian universities are endowed with intellectuals who can rank among the best in the

world. Genuinely "racing as it were to overtake one another in their bid for excellence and international recognition" (Ejiogu, 2010:432) these universities suffer serious set-backs due to a lack of political will by government to fund the system commensurably. It is such underfunding that accounts for most of the hiccups which we have identified in the universities. Rather than engage in the rascality of opening more universities to assuage some political agitators, government should embark on a policy of expansion and consolidation of existing institutions through proper funding. To do otherwise would amount to committing national education suicide.

The untoward consequences of these systemic hiccups are worrisome. The quality of degrees awarded has become generally suspect. Children of rich parents leave in droves for neighbouring countries whose universities are adjudged stable. The cost of such emigration on the national economy is disturbing. The private universities are not bringing about the expected succor as most of them do not even have enough qualified staff, the best of whom are aged retired professors from the public universities; there, crass commercialization is the name of the game. State universities are worse off as their governance lacks reason, with neither rhyme nor rhythm. Their proprietors (state governors) act as "emperors" or at best "lords of the manor" over their fiefdom, supposedly universities.

Wracked and strafed by crises of all sorts, the Nigerian university system is in dire need of a drastic reorganization whereby: meritocracy is the guiding principle in all activities; students pay tuition fees; bursary and scholarship awards are given to deserving students; adequate teaching and research facilities are provided; lecturers are equitably rewarded; and opening of new universities is put on hold until the existing ones are cleaned up to remove all wastages.

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BRAIN DRAIN IN HIGHER EDUCATION: LOST HOPE OR OPPORTUNITY?

Abstract

The flight of human capital is a phenomenon that has been of concern to academics and development practitioners for decades but unfortunately, there is no systematic record of the number of skilled professionals that many African countries have continued to lose to the developed world. Termed the "brain drain", it represents the loss of highly skilled professionals from a source country to a recipient country. Kenyan higher education institutions for many years have seemed to operate on the assumption that there will always be people ready to join the institutions as academic staff hence no emphasis on retention. The situation has gradually changed in the last two decades as public higher education institutions in Kenya have continued to face a number of challenges with regard to numbers and quality of academic staff. This led the Ministry of Education-Kenya (2006) to advice the institutions to show more eagerness to recruit, develop and retain qualified academics. However, it is clear that these challenges have not been met. This paper critically examines the migration and brain drain in public higher education institutions in Kenya and its implications and suggests that the institutions should continue to explore strategies on how best to use the skills and experience of emigrant academics, and how to minimise their outflow.

Introduction

Skilled manpower labour is an important asset for any nation in development process but this is gradually disappearing from the African continent into other parts of the world and concerns about this phenomenon have been expressed at various levels. Although some amount of mobility is obviously necessary if African countries are to integrate into the global economy, the migration of huge numbers of students and skilled persons pose a threat of a "brain drain" which can affect growth and development. While there is little doubt that highly skilled workers are scarce in many developing countries, it is also true that many academics, scientists, engineers, medical doctors and other highly trained professionals from developing countries work in the developed world.

About 3 percent of the world's population (191 million people) live in a country other than their country of birth, with 33 percent having moved from a developing country into a developed country (United Nations Department of Economic and Social Affairs, 2009). The actual data on brain drain in Africa is very scarce and the few available are inconsistent. However, the little statistics available clearly indicate a continent losing the very people it needs most for economic, social, scientific, and technological progress. According to the African Capacity Building Foundation, African countries lose approximately 20,000 skilled and qualified personnel every year to the developed countries and nearly one in 10 tertiary-educated adults that have some university or post secondary schooling and born in developing world now live in the developed world (Sriskandarajaah, 2005).

The brain drain has been the subject of highly controversial debates with three distinctive schools of thought. One examines it from the perspective of highly detrimental effects on the developing countries arising from the loss of their brightest minds and a second argues that the problem is overdramatised and draws attention to the beneficial consequences of the migration for countries losing the professionals. The third argue that it neither benefits the receiving nor the sending countries as African professional who live in developed countries find themselves in poorly paid jobs that have no relevance to their training or academic achievements and in the long run loose their competencies and are unable to make any contributions. For Africa, the phenomenon has resulted in a major development constraint (Sako, 2002) in the sense that the educational level of individuals that are leaving the continent to other parts of the world is high and many of these people subsequently do not return to their home country afterwards.

It is believed that the brain drain phenomenon began in Africa just after the independence of many countries, and has continued over the years. According to Wusu (2006), the number of Africans heading out of the continent was initially small during the 1960's, but later increased due to the deterioration of social, political and economic conditions. It is estimated that 27,000 highly educated Africans migrated to developed countries between 1960 and 1975, increased to 40,000 annually during the following decade, peaked at about 80,000 in 1987 but has levelled to about 20,000 a year since 1990 (Wusu, 2006, p.92).

Reasons for migration follow several patterns. Some Africans prefer to migrate to former colonial powers because of their familiarity with the language and culture and other destinations are influenced by geographical proximity and having support networks in the host country to help with adjustment to the new life and with finding temporary employment (Organization for Economic Cooperation and Development, 2001).

Push and pull factors and what migration means to African academics

The main causes of the brain drain can be generally understood when looking at the push-pull theory. The pull factors can be described as the favourable conditions in the receiving countries which attract many migrants from Africa, and make them decide to migrate in the first place. Among others, these include higher salaries and standard of living, high standard of education, safety of environment, less bureaucratic control and immigration policies encouraging migration. The push factors on the other hand, can be described as the unfavourable conditions in Africa which motivates people to migrate into other parts of the world. These include low wages and crimes, less job opportunities, poor educational systems, political repression, armed conflicts and lack of psychological satisfaction.

The question of what migration means particularly to African academics in the developed nations is important. Although the answer is beyond the scope of this paper, we can note that it is not pretty. It is written on the face of obnoxious waitresses and club bouncers, the policeman who treats you like criminal, colleagues who though you are doing the same job successfully still feel that you always need to prove yourself and the list runs on and on! It is reflected in the floods of negative media images that poison peoples' minds with racist stereotypes. African scholars are forced to confront the indelible mark of Africanity in their bodies and as Nesbit

(2002, p.71) puts it, they are "forced to wear, explain and even defend a badge of inferiority". You are no longer a Kenyan, a Nigerian or Malawian but a member of the mythical race created by white imagination. It creates a duality that is the root of the existential crisis faced by migrant African scholars.

The Kenyan situation

There are a number of reasons for my interest in the Kenyan migration. Kenyan population abroad is one of the top 10 among African countries and there is evidence that most Kenyan immigrants experience brain waste in developed countries. Kenya government has also of late consistently expressed interest in its Diaspora (Oyelere, 2007) and there is evidence that Kenya is experiencing a reduction in its national income due to the migration of its professionals (Nwachukwu, 1997).

The early emigration of Kenyans was a product of colonialism. Before 1960, most Kenyan immigrants went to the United Kingdom (UK), but with time, the outflow of skilled manpower moved more to the United States. This change was triggered by the tightening of immigration policy in Britain and the need for skilled human capital in the US. In higher education institutions, between 1960s to 1990s, a vibrant community of scholars left Kenya and many have continued to go overseas to seek better working and living conditions (Odhiambo, 2011).

The term "drain" conveys a strong implication of serious loss. However as indicated in this paper, there is also a growing recognition of the possible benefits of skilled migration for both migrants and the sending countries. For example, Docquire and Hillel (2011) have observed the possibility that high-skilled emigration can lead to a rise in human capital level in the home country. This phenomenon is generally referred to as brain gain. Some have argued that the benefits countries like Kenya might receive from high-skilled emigration could be seen in terms of return flows of income, investment and expertise from migrants back to the country. However, the question of how common these benefits are has been debateable.

Remittance sent back home by Africans in the Diaspora have grown tremendously in the past few years. Kenya for example, is only second to Nigeria is terms of the remittances in Africa. Kenya receives about a quarter of the funds entering the continent with money going to education and health needs of the senders relatives. A common argument has been that increasingly, Kenyans are shifting this resource from mere "sustenance remittance" to more focused investment. A brief look at monthly remittance in Kenya (see table 1) from overseas tend to shift more towards these arguments.

However, a number of scholars such as Ellerman (2006) have argued that flows of remittances are most unlikely to generate economic development although they may reduce poverty.

With regard to higher education, many scholars (e.g. Odhiambo, 2011) have continued to argue that it is one of the most effective instruments for economic, political, human resources and social development and hence the concern about academic brain drain. For example, Ogom (2007) argues that higher education enables a state to maintain a competitive advantage and stimulates scientific research that results into modernisation and social transformation.

Table 1: Monthly Remittance from Kenya's Diaspora (2004 to 2011 in US$ '000)

Year	2005	2006	2007	2008	2009	2010	2011
January	28,564	31,506	40,930	53,925	39,535	45,117	64,139
February	26,056	30,283	39,533	50,382	53,353	46,423	60,759
March	31,219	36,354	48,562	59,344	55,361	52,309	71,577
April	29,216	35,369	38,251	67,872	48,117	52,679	70,071
May	32,358	42,427	41,163	48,538	49,180	51,172	68,124
June	34,360	35,667	48,643	49,490	46,347	52,541	71,888
July	29,133	41,065	53,350	44,137	50,372	50,652	72,797
August	31,759	30,587	58,803	43,388	55,947	51,993	79,563
September	31,616	28,841	60,575	48,953	53,347	58,557	84,854
October	33,037	29,633	46,848	61,113	53,037	58,503	81,311
November	34,282	31,403	55,564	43,970	48,231	56,380	80,802
December	40,557	34,459	41,421	40,129	56,329	65,617	
Annual Total	382,153	407,593	573,643	611,241	609,156	641,943	805,865

(Source: Central Bank of Kenya)

Staffing, teaching and research in higher education in Kenya.

One of the challenges facing higher education in Kenya is the rapid decline in public expenditure on education relative to rapid increase in enrolments. The decreased governmental expenditure has caused strained relations between the government and universities and led to several other problems (see Odhiambo, 2011). The massive expansion of enrolments without corresponding increase in the academic staff has gradually led to a rise in staff/student ration in all public universities in Kenya.

Immediately following independence, Kenya's higher education sector was invested with high national aspirations and supported from public resources. The situation has now changed with reduced levels of public funding for hugely expanded and diversified sector (Odhiambo, 2011). The biggest challenge occasioned by this expansion has been the shortage of academic staff. Due to financial constraints, staff development demands have also not been met (Sifuna, 2010). These have had far reaching effects on the morale of the academic staff and the quality of education offered. As Sifuna (2010, p.420) argues:

> *In many universities, a PhD degree is no longer a requirement for tenure and publications are a less important criteria for judging who should be promoted. ...Moreover due to very low salaries, it is no longer possible to attract competent staff from abroad to teach in public Universities...*

Public universities in Kenya have almost exclusively depended on the government for staff salaries. Remuneration, conditions and terms of service have been major concerns for academic staff some of whom have left the country and never come back where as others have continued to look for better opportunities in the private sector. The demand for better pay has often led to standoffs between the government and the university academic union (UASU). As a manifest of all these problems, conditions of research and teaching have been severely compromised and this has lead to low morale among academic staff.

The decline of intellectualism in Kenya's higher education institutions has also made the institutions less appealing to many scholars who have moved out of the

country. In a lecture at Nairobi University, Mazrui (2003) argued that over the last forty years, East Africa (and particularly Kenya) has experienced the rise and decline of intellectuals. He argued that in the early years after independence, the university campuses vibrated with debates about fundamental issues of the day – nationalism, socialism, democracy and the party system, and the role of intellectuals and that since then, intellectualism has died in East Africa? Mazrui argued that it is important to answer the big question of who killed it.

In Kenya, Mazrui (2003) argues that the killers included rising authoritarianism in government and declining academic freedom on campuses. The fate of intellectualism became worse and worse during the years of President Daniel arap Moi. Many Kenyan academic exiles were victims of the Moi era repression even before leaving home, yet these same forces that kept them from achieving their full potential at home demonized them for leaving instead of contributing to "national development".

There are several ways through which Kenya government can draw on its academic talent abroad instead of demonising them. Among others, it can be done by encouraging collaboration in teaching and research between Kenyan scholars working abroad and Kenyan higher education institutions. It is clear that the promotion of higher education policy reforms and innovation in collaboration with academic Diaspora members is now vital.

Concluding remarks: implications for policy and practice

To solve problems pertaining to Kenya's academic brain drain we need to understand its nature and implications. This is not an easy task, because analysis of the migration of the highly skilled is based on little data and much conjecture. However, one of the salient issues raised in this paper is that in the absence of fundamental and sustained improvements in the socio-political and economic environment, both the Kenya government and higher education institutions will unfortunately be left with very limited levers for stopping the outflow of academics and attracting and retaining them.

Addressing this issue is neither about morality nor patriotism. Working conditions for academics should be improved and the institutions should provide salaries which reflect market conditions, invest in staff development and capacity building and provide modern facilities for teaching and research. They should find ways of making the institutions a more attractive place to work since academics will not return to Kenya simply out of patriotism.

Also lacking and needs immediate attention is effective political leadership for effective educational policies. To reverse this academic brain drain crisis, the institutions and the government should commit themselves to effective governance and leadership, to improving political structures and initiating improvement in certain social conditions that undermine productivity. These changes might go a long way to encourage Kenyans students to return to their home after achieving their education and to discourage those migrating after their education in Kenya.

The problem of academic brain drain needs a holistic and comprehensive approach. Higher education institutions in Kenya should continue to explore strategies on how best to use the skills and experience of emigrant academics and how to minimise their outflow.

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SEARCHING FOR THE DIVIDENDS OF RELIGIOUS LIBERTY: WHO BENEFITS AND WHO PAYS?[1]

Abstract

Although recent research has established that there are positive correlations among indicators of religious freedom and social capital and economic development, the question addressed in this paper has to do with the evangelistic success of three outreach-oriented churches with worldwide membership bases. This preliminary investigation uses only the Average Quinquennial Growth Rate (AQGR) as the dependent variable of interest.

Jehovah's Witnesses, Mormons (or, interchangeably, LDS) and Seventh-day Adventists all share a great deal in common. They are strict in the sense of requiring adherence to behavior peculiar to their religious tradition and uncommon to the cultures in which they are embedded. They also rely heavily on worldwide evangelism to spread their message and acquire new adherents. All three religions have approximately fifty-year histories in a wide range of countries, and employ active proselyting methods for spreading their message to attract new adherents. These religions are all active in the promotion of freedom of religion in the legal and social contexts in which they perform their evangelizing activities.

The central question addressed in this paper is whether religious liberty has affected membership growth in a sample of 170 countries over a period of the past fifty years. Scholars have hypothesized a negative relationship but this has never been demonstrated empirically to our knowledge. We were unable to find a significant association between a range of religious liberty measures and our indicator of membership growth for any of the three religious groups under consideration. Our large 50-year (1960 to 2010) and 170 country database did show statistical associations between membership growth and human development (strongly negative), and also with economic development (also negative), providing some support for the modernization theory of religious growth.

Introduction

Recent research by Grim and Finke has established that there are positive correlations among indicators of religious freedom and economic development.[2] Many, but not all, modern states understand the benefits that accrue to them from a legal climate of religious freedom and a social culture free of social hostilities toward religious bodies. Still the question of the impact of religious liberty on the ability of organized religion to succeed in their core mission has yet to be examined.

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[1] This is a revised draft of a paper that was originally prepared for the October 2011 annual meeting of the Association of Universities for Democracy in Dubrovnik, Croatia. This early revision is currently in preparation at the Geneva office of the Kennedy Center for International Studies.

[2] See Brian J. Grim and Roger Finke, The Price of Freedom Denied; Religious Persecution and Conflict in the Twenty-First Century; Cambridge University Press, 2011.

Specifically, do Christian evangelizing religions benefit directly from religious liberty? This paper addresses an issue of interest to social scientists who study religious growth factors and to religions that defend religious liberty on the grounds that their survival is at stake.

Modernization theorists have maintained that the inherent attraction of religion declines with the rise of secular society. But some faith-based organizations disagree: *"For years, it was assumed, certainly in the West, that, as society developed, religion would wither away,"* said Tony Blair in a January 2, 2012 blogpost *"Faith in a Globalized Age,"* published on *New Europe Online. "But it hasn't,"* said the former British Prime Minister, *"For many Europeans brought up in the 1960s and 1970s there was a single equation: as society progressed, religion would decline. It hasn't happened. The global numbers of those espousing a faith has increased and what's more has increased even in many nations enjoying strong prospects of development."*

Tony Blair doesn't explicitly identify freedom of religion as a causal factor in the rise of religious identification but others have.

If religious freedom is merely a public cover for the rise of socially divisive schisms, who really benefits from its presence? If not the tax-paying public then who? Do religions themselves benefit? Christian religions typically invest heavily in the legal defense and promotion of religious freedom even though there is scant evidence that its presence or absence materially affects the success of their evangelistic endeavors.

Religious bodies, we assume, defend freedom of religion, because they benefit from it. This paper is an attempt to examine that very relationship. It asks whether or not three specific Christian religions, well known for their strict observance and proselytism, benefit from high levels of freedom of religion. To our knowledge this proposition has never before been put to an empirical test. Outstanding research by Grim and Finke have lead to the conclusion that there are many tangible benefits to society of religious liberty and that where it is in jeopardy and declining, a host of social ills are sure to follow.

Modernizations theorists have argued that as societies evolve from predominately rural agrarian to urban industrial their denizens will likewise change from reliance on religion to fulfill their communal needs and provide answers to natural phenomena to scientists and people enlightened by higher humanistic learning. How can religions survive then in an era of ever increasing urbanization, secular education, widespread and low cost availability of knowledge? Is freedom of religion a necessary element, a sort of ancient buffer zone in which religions take refuge in the modern age?

Opponents of religious freedom point to the persistence of religious related violence. They reason that eliminating the opportunity for religions to operate would also decrease the levels of inter-religious warfare. Such opposition to freedom of religion often appears in the argument that religions fight tooth and nail for freedom of religion because they, and only they, benefit from it. We all know of an instance somewhere, or suppose we do, where a victory for one religion or another was a loss for agnostics or atheists. Non-religious people, this line of reasoning assumes, are forced to pay for religious freedom but derive no benefits from it. In

the absence of evidence, these arguments are difficult either to sustain or debunk. In the face of intuition and anecdotal evidence, it is always good to look at data.

What is Freedom of Religion?

Freedom of Religion or Belief is explicitly acknowledged in the United Nations as a human right. This right was enshrined in Article 18 of the Universal Declaration of Human Rights and has been used throughout the free world as the basis for legal opinions and customary law. Legal scholars and social scientists from a variety of disciplines have in recent years pointed to a range of threats to religious liberty stemming from both courts and legislative bodies at the national and international levels. Among many others, one recurring concern about the effects of the erosion of religious liberty is the impact this might have on the ability of some faiths to carry out the work that is a central feature of their existential rationale. This study intends to cast empirical light on the strength and validity of the relationship between measures of religious liberty on the one hand and religious success on the other.

Again, the central question is how religious success is affected by the presence or absence of religious liberty. Scholars suspect that the two have a direct positive relationship but this has never been demonstrated empirically to our knowledge. Freedom of Religion, the subject of a huge literature in the field of International Law and religious studies generally, is not commonplace in the Sociology of Religion. It is not prominent in the religious economies model, which seems an oversight given the contextual prominence of both government regulation and social restrictions on the observance of religion as a practical, daily matter.

Methods

This research draws heavily on ARDA[3] and Freedom House data to quantify the nature of religious freedom present in a given year in most countries of the world. ARDA data refer either to government laws, regulations and established practice, or to social acceptance or rejection of religion by the citizens of a nation state. The 60 variables that are collected by ARDA are combined into three composite measures. We use the composite indicators in this work. Variations in the degree of religious freedom, as summarized by the composite or scale score, are related statistically to variation in religious success. Due to the limited time frame covered by the ARDA data, we found it necessary to also use a source for estimates of religious freedom prior to 2000. The best data source was Freedom House, whose "civil liberties" variable is based on the Universal Declaration of Human Rights and has a substantial proportion of questions devoted to freedom of religion and belief.

For purposes of this study three religions are compared: The Church of Jesus Christ of Latter-day Saints (Mormons or alternatively LDS), Seventh-day Adventists (SDA) and Jehovah's Witnesses (JW). These well-known Christian religions all have western (American) origins and rely heavily on worldwide evangelism to

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[3] The Association of Religious Data Archive (ARDA) is a collection of surveys, polls, and other data submitted by researchers and made available online by the ARDA.

spread their message, acquire new adherents, and establish themselves as recognized religious organizations for legal and tax purposes.

In this preliminary investigation, we use membership growth as a proxy measure of evangelistic success. The annual number of new adherents added to membership roles in a given country is one fair, and perhaps the most commonplace denominator, of success. Throughout most of the Christian community, membership growth denotes the effective spreading of the Christian gospel as understood by a particular Christian denomination.

Membership Data Sources and Constraints

Initial efforts to compile a working data set included 210 countries. Many of these were not members of the United Nations and others were very small with populations of less than 50,000. Eventually the decision was taken to limit our attention to countries with populations of greater than 250,000. This decision left us 170 countries and allows us to focus on countries that are most likely to act independent of larger neighbors. This decision excludes less than .5 percent of the world's population.

Religion membership data for total annual membership over the fifty-year time frame (1960 to 2010) are available from a number of sources; however, this paper relies on officially published "membership" numbers. Membership is defined differently even among these three religions that otherwise have much in common. Total membership may include annual increases from natural internal births and from converts reported for a given year. Or it may focus on measures of religious practice or observance, as illustrated best by Jehovah's Witnesses or the Watchtower Bible and Tract Society.

Analysis and Results

The first step in a long process was to calculate the growth rates or, more precisely, the Annual Average Quinquennial Growth Rates. Bearing in mind our decision to use a five-year clustered rate called a "quinquennium" the rate is expressed as the average, compound five-year growth rate for a group or hereafter the AQGR. Membership data were exhaustively checked against many reliable sources.

The AQGR were calculated by year, country and religion. The results reveal a clear pattern in the 50-year decline in growth rates. For the LDS, for example, the 24.1 AQGR for the first five-year period (Q60 or 1960 to 1965) declines to 4.3 AQGR for Q05, the last period beginning in 2005 and ending in 2010. The JW growth rate decline is similar but starts lower at 8.4 and ends lower at just 0.7. So the downward trend in growth rates is substantial and unmistakable. Remembering that this is still positive growth, the worldwide decline at the same time for three completely independent religious bodies is suggestive of an external cause rather than an internal policy shift. At this point we do not attempt to "explain" this change, merely to note its existence.

Findings on the Impact of Religious Freedom on Membership Growth

The principal objective of this research is to discover the impact of religious liberty on the ability of three strict, proselyting Christian religions to increase their memberships worldwide. Are the religious membership growth figures different for our 170-country population when controlling for religious liberty reported in each country for a particular five-year time period?

Examination of data from all three religions revealed a consistent pattern in which the relationhsip between measured religious liberty and growth rates were, with very few exceptions, low and negative. Expressed differently, the growth rates for the LDS are higher when the country-level freedom of religion measures are slightly lower. We see that the Freedom of Religion increases slowly overtime in a straight moderately rising trend line. The 40-year[4] trend line for the LDS AQGR rises slightly to 1975 and followed thereafter by a steady sharp downward decline.

The analysis was repeated for Jehovah's Witnesses data. The JW results are consistent and little affected by the separation into homogenous religious liberty categories. Initially it appears that there is a small benefit from high level of religious freedom; but that advantage is not found by 1975 and there appears to be the opposite relationship in Q95 and subsequent years. In other words, similar to the LDS finding, JW membership growth is negatively associated with religious freedom—the more freedom observed the lower the growth rate. These relationships are not large but consistent at every time period.

We next turned to the Seventh-day Adventist data. The analysis for Adventists once again revealed the same clear pattern of association between religious liberty and membership growth. Like the other two denominations, the most prominent features are the slow but inexorable decline in the growth rates and the negative association with religious liberty. When we looked at the Adventist country level data divided into three freedom groupings (low, medium and high religious liberty) we again were surprised to discover that, in most five-year periods, the Adventists grew faster in countries displaying the lowest levels of freedom of religion.

At this point, the analysis leads to the conclusion that while religious liberty, however measured, is slowly but steadily improving worldwide, with several glaring exceptions, the same cannot be said for religious membership growth that presumably benefitted from it. Freedom of Religion is a demand side variable, outside the direct control of religious bodies themselves. If membership growth rates are declining steadily in the face of small advances in freedom of religion, the connection between the two is problematic at best. The absence of statistically significant correlations between the two sets of variables even when measured contemporaneously, gives support to the view that freedom of religion has not played a large role in membership growth, in either direction.

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[4] Since the Freedom House data begin with 1972, this analysis was limited to a 40-year timeline rather than 50 as we had planned to have.

Are There Any Demand-Side Variables Affecting Religious Membership Growth?

Even if freedom of religion is not related to membership growth, are there no contextual or demand side country characteristics that are? There were two possibilities: the Human Development Index or HDI and familiar indicators of national prosperity such as GDP per capita. Both had been reported to be association with the growth of new religions worldwide.

At the risk of detracting from the emphasis on freedom of religion, we found these demand side characteristics to be strongly related to religious membership growth. The Human Development Index stands out as a particularly high correlation with membership growth for all three religions. The strength and direction of this relationship caught our attention. The high religious membership growth countries have **lower HDI scores** than do the low growth countries—so the relationship is negative and strong. Most of these correlations between HDI and religious growth are statistically significant at the .05 level and many of them are quite large. These correlations reveal a truly remarkable negative association between the Human Development Index and membership growth and this relationship has been in place for a long time and is the same for all three religions.

There is a powerful story here—we just don't know exactly what it is. What has been shown is that some demand side characteristics of a country are related to growth. But of the three we examined here, Human Development Index, Wealth per capita, and Freedom of Religion, only the last one, Freedom of Religion, shows small empirical association with membership growth—the other two demonstrate quite robust associations.

Discussion

It is not logical to suppose that most people, when asked to provide reasons for their religious conversion, would look to demand side variable in providing an answer. One would not likely expect to hear a new convert describing his or her lack of secondary education or poor access to preventive health care or abundant religious freedom as a motivating factor in the decision. This is not to doubt that there are many predisposing demand-side, contextual variables. Still it is instructive to examine reasons that are actually given. The recent Pew Institute publication "Mormons in America" provides just this sort of opportunity for one country. What it does not do is provide a comparative analysis of conversion factors across many countries and over long periods of time.

For the United States, when Pew survey researchers asked sample respondents to describe in their own words their reasons for converting to Mormonism, 59 percent of American converts to Mormonism cite the religion's beliefs as a reason.[5] The most common responses within this category are general statements about the religion being true or making sense (38 percent), as well as statements about the Book of Mormon or other scriptures (13 percent). Mormonism's emphasis on the family and family values is cited as a reason for converting by 5 percent of converts,

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[5] *Mormons in America: Certain in Their Beliefs, Uncertain of Their Place in Society*, The Pew Forum on Religion in Public Life; January 12, 2012.

and 3 percent cite the faith's specific teaching that families can be bound together for eternity.

Although it is tempting to speculate that reasons for joining a new faith in the Democratic Republic of Congo may be different from reasons in the United States, we are not confident that such differences exist. In short, we conclude that the often-acknowledged difficulty in disentangling supply and demand side characteristics in explanations of religious membership growth exists for us.

Conclusions

Religious liberty has a peculiar relationship to membership growth. The peculiarity is less a matter of having a negative or positive influence and more a question of being hard to find at all. When viewed from an "economics of religion" perspective, where religious liberty shows an influence on membership growth at all, it is a slightly negative one. As a demand-side variable (characteristics of the country not controlled by the religion), its impact probably is indirect through formal state recognition or registration, allowing the entry of missionaries and in providing an enabling legal environment of property ownership and tax exemptions.

Once a church presence has been established, often through foreign-born missionaries, membership growth is predominately a function of supply side variables (aspects of the faith that they control). Religious liberty, of course, isn't a supply side variable and consequently has little to do with predicting how well the religion performs in terms of adding proselytes or in establishing a strong institutional capacity, for example, new stakes or temples.

This isn't intuitively obvious. Many casual observers have been tempted to conclude that strictures against religion such as proselyting bans, restrictive registration laws, strong bias against non-majority religions, are at least as important as any inherent attraction that a new religion might itself provide. We find no evidence for these conclusions.

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MORE THAN MERE LAW: FREEDOM OF RELIGION OR BELIEF

Abstract

Article 18 of the Universal Declaration of Human Rights establishes that all people, simply because they are human, enjoy the right to freedom of religion and that governments have the obligation to ensure the protection of that right. Yet we witness a world increasingly divided by religious tradition. The failures of many governments to ensure and protect religious liberty, and the impunity with which violators of religious liberty carry out their agenda of violence, fear and hate are commonplace. The language of human rights is an integral part of the concept of our inter-connectedness as humans. To ensure that Freedom of Religion is understood as an unalienable principle of society, the Universal Declaration and the language of human rights should be integrated into the obligatory curriculum of schools everywhere.

Introduction

The Universal Declaration of Human Rights is unquestionably a landmark in the history of moral consciousness, one of the factors that have consistently given hope and purpose to political life throughout the globe since it first saw the light of day in 1948. It has offered a global benchmark for identifying injustices to those who have never been able to make their voices heard.

The Universal Declaration of Human Rights was the UN's first ambitious undertaking—nothing less than an international Bill of Rights. Article 18 of the Universal Declaration is our special mandate at the United Nations. It describes the right to freedom or belief very clearly: Quote, "Everyone has the right to freedom of thought, conscience and religion; this right includes freedom to change his religion or belief, and freedom either alone or in community with others, and in public or in private, to manifest his religion or belief in teaching, practice, worship, or observance."

And, for all the challenges facing Article 18, which I shall come back to in a moment, it has been an energizing force in more than one community of faith in their struggle against arbitrary oppression and for the protection of the vulnerable. Yet the language of freedom of religion has become more rather than less problematic in recent years. An illustration of this could come from one of several Western European countries where questions about freedom of religion have begun to give anxiety to some religious communities who feel that foreign cultural standards are being imposed – for example, in regard to religious attire. And so we face the worrying prospect of a gap opening up between the discourse of religious liberty, increasingly conceived as a universal legal code, and the traditional moral and religious cultures of diverse religious communities in our countries. I want to suggest ways to bridge that gap.

Actually, I want to do several things. First, as I've mentioned already, I will suggest some ways in which we might reconnect thinking about human rights and religious conviction – convictions about human dignity and human relatedness, how

we belong together. I believe this reconnection can be done by trying to understand freedom of religion against a background not of perceived injustices against a particular religion but of the question of what is involved in mutual recognition among human beings. The language of religious liberty gets difficult only when it is divorced from that awareness of belonging and reciprocity.

Second, I wish to suggest the urgency of Freedom of Religion or Belief. It is an urgency of our time and making. The urgency born of human suffering of the worst sort—the kind that humans inflict on each other—which differs from the suffering of natural calamities. The atrocities I speak are of our volition and they are preventable.

Third and finally, I hope to remind us as educators (whether we are classroom teachers or otherwise, we are educators) that human rights education should rise to the top tier of an international curriculum for the young who will indeed inherit the earth.

How Religion Unites Us

The **"universal"** aspect of freedom of religion or belief and all other human rights, is a central element in the bridge I would have us construct. What makes the gap between religion and the discourse of rights worrying is that the language of the Universal Declaration is unthinkable without the kind of moral universalism that the Universal Declaration safeguards. The presupposition of the Universal Declaration is that there is a level of respect owed to human beings irrespective of their nationality, legal status, gender, age, sexual orientation, religious affiliation, education attainment or worldly achievement. People have a status simply as members of the human race. The language of human rights takes for granted that there are some things that remain true about the nature or character of human beings whatever particular circumstances prevail.

This universal sameness is the bridge that connects religion and rights—however different we may appear to be in some ways, those differences are merely outer shells. We are all even more powerfully the same.

How Religion Divides Us

"Religion" is a fine word. It is not offensive. It is commonly accepted and used in all languages with the same meaning. As far as we know, religions and beliefs have always existed in human societies. But religion is, at least in its misapplication, a source of enormous human tension. Let us ponder the reasons.

Religious liberty means the right to choose what to believe and how to show or manifest your religion or belief. It means the right to change; the right to teach; the right to share what you believe. You would think that kind of statement would put advocates of religious freedom or belief in a strong moral position, but instead, we are seeing a shift in the world toward increasing religious persecution. The right to choose and to change are often at the root of the problem. We are apparently afraid that in an atmosphere of freedom, we will not be chosen.

Shahbaz Bhatti, Pakistan's Minister of Minorities, was killed in March of last year by his own guard because he was campaigning against the country's blasphemy law. He did not agree that speaking about Christianity was blasphemy and defended

a Christian woman who had been imprisoned. This is merely one example of many illustrating the harsh reality that freedom of religion or belief is currently under attack.

But it isn't only in Pakistan. People across the world are suffering from violent persecution. Coptic Christians in Egypt and Buddhists in Myanmar and Muslims and Christians in Nigeria, Protestants in Mexico. These are not dangerous people and they are not bad people. Most of the time they are good people. But they are being discriminated against and persecuted, often physically abused and killed every single day because of their beliefs. They are miserable and often helpless.

When you do not have religious freedom you cannot go to the church of your choice, or any church at all in some countries. You cannot hold or talk about different beliefs, especially if you are part of a minority. You are persecuted—not because you are a bad citizen but just because of your religion or belief. You are fair game for bullies and bigots and fanatics.

Three years ago, a Hindu monk and spiritual leader was attacked and killed. In the violence that followed, 59 people died and 18,000 were injured, including young children burned and maimed – simply because some fellow citizens didn't like what the monk and his followers were saying.

Last year in Mexico, 24 evangelical Christian families, all indigenous Native Americans, were forced to abandon their homes and farms because they would not participate in nor contribute financially to a traditional ceremony of another Christian religion. This was Christian on Christian violence. Unfortunately, this was not an isolated event, and the numbers are on the rise.

Why the increase? There are at least three reasons for the escalation in violent religious persecution.

First, some governments seek to control their populations by controlling their religious affiliation. People are not allowed to say anything critical of the majority religion. Punishment ranges anywhere from fines to death sentences. Second, some governments form partnerships with the majority religion against minority religions. The claim is that the state and religion work in unity to build up the nation. But in fact the government passes laws that help the majority religion get rid of religious dissenters and pesky competition from religious minorities and then rewards loyalty to the party though state subsidy taken, of course, from the public treasury. In return, the majority religion leaders support political leaders and policies from the pulpit and behind the scenes. Minority groups are left out of the partnership, subjected to harsh registration laws and are viewed with suspicion by fellow citizens and ignored when they are violently persecuted.

The third reason for increasing levels of religious persecution has to do with fear of proselytism or evangelizing, efforts by one group or person to convert or persuade other people to change their beliefs. Majority religions often see proselytism as an attack, and feel threatened, no matter who they are. Allowing people to change their religion is disruptive to the community, they say. Muslims feel under attack, so they propose a U.N. resolution on defamation of religion. But Western Christianity feels under attack, too, so we see governments voting to ban Muslim minarets, for example, as the Swiss have recently done, or the French law against headscarves. These are not good signs even if the intentions are good. In fact, they are signs of religious intolerance.

Research evidence does not support the conclusion that restrictions on religion are necessary to maintain order or preserve a peaceful religious homogeneity. Recent long-term studies show that religious freedom is the antidote to these conflicts, not the cause.

An excellent book by two prominent sociologists was recently published called "The Price of Freedom Denied." Their research shows that restrictions on religious freedom produce greater persecution and conflict. Denying people their right to religious freedom undermines democracy and contributes to terrorism and international instability. And it turns out that the opposite is also true. Where there is religious liberty, other rights also increase. There is greater satisfaction and more development and education and increased women's rights and better health and national wellbeing.

Did you know that 70 percent of the world's population live in countries where they have no religious freedom? At the same time there are many countries that protect religious freedom. This is good news. But religious freedom is being more frequently challenged across the world. This is not good news. We can lose freedom of religion or belief. We need to send a strong message that we love religious liberty and we want to keep it.

Perhaps the most important step we can take today toward reducing religious conflict is in how we teach each other through our conversations and our behavior toward fellow students and people in our community. Make friends with people who do not share your beliefs. We can't promote religious freedom if we have no contact with religion or beliefs other than our own. Freedom of religion is currently facing its greatest challenges in its 63-year history.

Why Freedom of Religion Must be Part of School Education

From one point of view, freedom of religion has to do with the individual person, establishing the status of the person as something independent of any society. Take away this moral underpinning, and language about religious liberty can become either a purely aspirational matter or something that is simply prescribed by law. The same is true of religious practices, observances and preferences of all people. Whether or not a person has achieved formal citizenship in the land where she finds herself, the fact that she is human endows her with the right to freedom of religion.

It is important for the language of freedom of religion not to lose its anchorage in a universalist secular ethic – and just as important for religious believers not to back away from the territory and treat rights language as an essentially secular matter, potentially at odds with the morality and spirituality of believers. The preservation of secular language of religious liberty is the province of the school and the vocabulary of religion the province of the Church or Synagogue or Mosque or other establishment of religious education—both are complimentary and necessary.

The urgency of inclusion of human rights, especially freedom of religion or belief, in the school curriculum can be illustrated in many ways. Today, the protection of religious minorities, not only from very specific kinds of practical discrimination but also from demeaning public speech, reflects a reactive move, not an educational one. "Civics education", instruction about moral and awareness of a society, leads young people to recognize that certain ways of speaking and behaving

may restrict or enhance the possibilities of certain groups. Where it may have been commonplace to use stereotypic words and images of others, young people come to see that by using such words and mental images, they are in effect treating some person or group as people we need not fully recognize as fellow-humans and fellow-citizens, people who do not belong in the same way that they do. But religious freedom education creates a culture of acceptance before the law must step in to do what should be done in the first place.

Again, in the last century or so, human rights education in schools has advanced the idea that women must be treated equally in society and in law. Bit by bit, schools in many countries have identified some of the ways in which women receive less than full recognition in society, how employment opportunities are skewed by assumptions about the superiority of men, how the imbalance of power leaves women vulnerable to sexual exploitation or harassment. Education ideally precedes the law, asserting that women have received less than is due to them, and that practices that perpetuate this should be proscribed. The law then follows naturally. Probably more rapidly than anyone expected, the same principles have led, in many parts of the world, to various enactments for the protection of sexual minorities. At the moment, the vulnerable position of religious minorities is fast becoming a matter of urgency in many contexts. Schools can and should exert their influence to advance the powerful notion of the universality of humankind.

School education should, I suggest, include the following elements in a curriculum of human rights.

1. **Make explicit the connection between religious belief and the discourse of human rights.** The existence of laws discriminating against religious minorities as such can have no justification in societies that are serious about law itself. Such laws reflect a refusal to recognize that minorities belong, and they are indeed directly comparable to racial discrimination. Laws that criminalize belonging to certain religious denominations need the most careful scrutiny: legislation in this area is very definitely to do with the protection of the vulnerable from those with power to exploit and harm.

2. **Acknowledge the dignity of another person by admitting that there is something about them that is, something beyond me: something to which my individual purposes, preferences, fears or hopes are irrelevant**. The other is involved with more than me – or indeed, more than people that I think are just like me. Mutual respect in a society, paradoxically, means both the recognition of another or another's religion as mattering in the same way that I matter or that my religion matters. It is an understanding of sharing the same human condition, and the recognition that this entails their religion not being at my disposal, respecting their independent right to pursue their faith.

3. **Establish a global account of what human dignity means and how it is grounded.** It cannot be left dependent on the decision of individuals or societies to ensure freedom of religion: that would turn it into a particular bundle of cultural options among others – inviting the skeptical response that it is just what happens to suit the current global hegemonies. It has to establish itself as a vision that makes sense of the practice of law within and between societies – something that provides a general template for looking critically at the claims of any particular society to be equitable and inclusive, not something that just represents the preferences of the

powerful. A credible, sustainable doctrine of religious freedom must therefore be both modest and insistently ambitious. It must be modest in seeing itself as the legal solution to all problems arising in the context of a broad-based struggle for social equity and justice; but it must be ambitious in insisting on the dignity of every religious minority and their consequent claim to protection, to be allowed to make their contribution, to have their voice made audible.

4. **Religious liberty must be understood to belong to the entire human race.** It is essential that, in an age that is often simultaneously global and self preoccupied we do not allow the language of religious liberty to wander too far from its roots in an acknowledgement of the sacred—common to the whole of the human race. This means, on the one hand, that would-be secular accounts of religious liberty need to hear the arguments against an excessively abstract legalistic model of clearly defined claims to be tried before an impartial or universal tribunal. On the other, it means a warning to religious bodies not to try to make anxieties about their freedom to make religiously based ethical judgments an excuse for denying the unconditionality of the language of rights for religious groups with whom they disagree. Too much is at stake for the world's well-being.

Conclusion

In her recent address to the United Nations in Geneva, U.S. Secretary of State Hillary Clinton, spoke of the forgotten LGBT community, calling it a human right not formally included in the universal declaration and made a cogent and passionate appeal for our involvement. We today, have talked about Article 18, an included but neglected part of the universal rights, but we can do no better than to end by repeating Secretary Clinton's final sentence: "We are called once more to make real the words of the Universal. Let us answer that call. Let us be on the right side of history, for our people, our nations, and future generations, whose lives will be shaped by the work we do today."

Human Rights are universal and indivisible. We cannot pick those we like and discard the rest. The understanding of religious liberty as a human right is essential medication to heal the factious world we live in. It must find a place alongside other great truths that are passed from one generation to the next through inclusion in the formal curriculum of our schools. Echoing once more the inspiring words of Secretary Clinton, "I come before you with great hope and confidence that no matter how long the road ahead, we will travel it successfully together."

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INTERGENERATIONAL LEARNING IN THE FAMILY

Abstract

Intergenerational learning in the family is today often hindered due to the family changes and changes in society. We start from the supposition, that social transitions between generations are still important for transmission of heritage and knowledge. In the paper we discuss the connectedness of intergenerational learning, socialization, and communication. The research focuses on the perception of three generations in the family about mutual learning and cooperation, the influence of family members' interconnectedness and the contents of mutual learning between the three generations. On the basis of case studies analyses we can ascertain, that learning in the family truly includes cognitive, emotional and social components; social learning, which goes on in the family, is closely related to interaction, communication, and the quality of relations in the family.

Learning as an accompanying process in the family

Many authors (Bengtson, 2001; Popenoe, 1993) have posited that from the sixties of the preceding century the nuclear family has been in decline. Some social theoreticians claim that due to the specific economic and cultural circumstances in the industrial society the process of modernization the 'family' gradually transformed from an extended family, which was the predominant form in the preindustrial societies and initial phases of industrialization, to a small nuclear family (Putney & Bengtson, 2003, p. 150). Those claim that at that time new social institutions developed and took over many of the family functions, which influenced the changing functions of the family from socially-institutional to emotionally-supportive, which is typical for the modern nuclear family (Burgess, 1960, in Putney & Bengtson, 2003).

Family changes are presented as a heterogeneity of family forms; families are reorganized, new types of families are reestablished. Nevertheless, most of the intergenerational support goes from older to younger generations for financial as well as for social support (Bengtson, 2001; Gauthier, 2002; Albertini, Kohli & Vogel, 2007). Researchers thus claim that also in new social situations and adjustments to change multigenerational families still perform their function.

Family remains the key socialization factor through the life course; intergenerational learning plays an important role in this process. Intergenerational learning in the family involves intentional and unintentional learning activities and exchange of experiences amongst generations (Newman & Hatton-Yeo, 2008); it is based on reciprocity and cooperation between young and old, which results in variously strong ties between the generations and in a benefit of one or both groups. It is intergenerational family socialization, which can be defined as lifelong mutual influence between generations inside the family, occurring in changed social and historical circumstances (Kemp, 2007, p. 859); it involves (both-way) intentional and unintentional transmission of positions and behavior between generations (Uhlenberg & Mueller, 2003, p. 126). The research of socialization in the family

community can be based on conceptualization of interpretative paradigm of symbolic interactionism (Berger & Luckmann, 1988; Mead, 1997). Due to the theory of symbolic interactionism an individual is formed in social interaction and communication in social relation, and in confrontation with important others. Family members' behavior is a result of mutual acts of family members and interpretations of meanings of social situations, where it is evaluated, confirmed, and rejected. "Theory of social exchange" defines relations between involved actors and mutual interdependence (Silverstein et al. 2002, p. S4). The act of giving to others and setting conditions for later return is social glue, which promises stability and solidarity in the family.

Social learning in the family is strongly connected with existent interaction, communication and the quality of relations in the family. It is comprised of cognitive, emotional, and social components, which are closely interconnected[1] (Illeris, 2004, p. 19). Lave (2009) describes the learning process in the family as activity, reflection, communication, and negotiation among included members. Learning is personal, teachers are relatives. It is learning by observing and imitating; it is a tradition, perseverance, and continuity and it involves understanding, insight, emotions, and opinions. Also, Wenger (2009, p. 211) understands learning as social phenomenon; his 'social theory of learning' indicates that learners in the family experience the same historical and social sources, networks, and perspectives, which connect them in common learning activities.

Research methodology

For the purpose of this paper the qualitative data was gathered[2] within the research "Intergenerational solidarity in Slovenia".[3] The research was carried out in the spring of 2010.[4] We have involved three generations in the same family. The gathered data was analyzed using grounded theory (Strauss in Corbin, 1990). This inductive methodological approach allows a deeper understanding of analyzed comprehension and viewpoints of interviewees and explanation of semantic relations between them. We' analyzed the statements of all interviewees about their own understanding of intergenerational learning and the experiencing of it, cooperation and mutual help in the family, the connection between their comprehension of learning in the family and the evaluation of that learning.

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[1] The cognitive learning process in the family includes acquiring skills and knowledge, an emotional component that comprehends interpersonal energy, and is transmitted with emotions and values. But, learning is also a social process, social interaction, which includes the interaction between an individual and their environment, and is influenced by social context, where it is happening.

[2] The data was gathered by students from the 4th year of Andragogy studies at the Department of Pedagogy and Andragogy, Faculty of Arts, Ljubljana, who were especially trained for the conduction of deep, semi-structured interviews.

[3] The basic research project, headed by Dr. Valentina Hlebec, is an ongoing project (2009 – 2012).

[4] Each student described his family with the previously described guidelines, and as well selected an appropriate line of observation (student – one parent – one grandparent from the selected parent line) with whom he conducted two in-depth interviews.

In the sample there were 23 families (69 persons, 9 men and 60 women). The average age of the interviewees in the 1st generation was 24 years, of the 2nd generation 49 years and the 3rd generation 75 years. The level of education differs between generations.[5]

The case studies of three families were chosen due to the intensity of mutual connectedness and communication between three generations in the family, and due to the inclusion of the family members into the community's activities. In this presentation some of the answers are presented.[6]

Tightly knit and close family

A four member nuclear family (a father, a mother, and two children) lives in their own house in a village. Contacts with the grandparents are daily (phone calls), and family members visit them weekly. As the student described, mutual trust, respect and support exists in the family. Members of the extended family are not involved in local community activities. This is clearly illustrated by the mother's statement: "*We have our family and friends, and that is enough for us.*"

We asked the members of three generations about the most important asset, value, or lesson, received from grandparents or another older person; their answers match to a high degree.

MSS-02-Maja-25-1: *I received many lessons from my grandmothers and grandfather...life lessons. Maybe the most valuable asset was that they convinced me to look for good in others.*

About the similar question, if they received any values or lessons from their children or grandchildren, a mother thinks that she can get a lesson only from somebody older than her or somebody as old as her. A grandmother avoids answering. We can conclude that social learning in the family is understood mainly as a one way process, a transfer from older to younger family members and not the other way around.

About the reciprocity and mutual assistance between generations in a family, the interviewees responded similarly.

MSS-02-Ivanka-69-3: *Reciprocity and mutual assistance were present especially from my mother and my sisters. Assistance is, of course, present between me, my daughter, and her family. So this has always been here in our family.*

The grandmother shakes her statement about mutual assistance in a family, when thinking that young people don't take care of her enough, that her role in the family isn't important because she is a widow and lives alone. When she talks about it, her feelings of loneliness and isolation are noticeable despite the fact that she lives in a house next door to her children and grandchildren, and by the statement of the student, that they keep in touch with each other daily.

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[5] Most of the 2nd generation interviewees (40%) completed secondary school, 30% had a college or university degree, 21% went to vocational school (3 years), and 9% had a primary school education or less. Grandparents (the 3rd generation) have substantially lower level of education than their children (the 2nd generation); most of them (69%) completed primary school or less, 13% secondary school and only 5% a college or university degree.

[6] The used quotations are labeled with a research code (MSS), family code, fictional name, age of interviewee, and the mark of generation to which the person belongs.

Disconnected family

A student lives in a five-member family in an apartment in town with a mother, stepfather, stepbrother, and stepsister. Her father died. The grandparents live in a house in a suburb. The student believes that there is no trust in the family and communication is insensible. She is only emotionally attached to her mother. Student has monthly contact with grandparents, but her parents have even less than monthly contacts with their parents. Members of the family are not active in the community, only the grandmother is (in a charity organization, helps older and sick people with domestic care).

When asked what was the most valuable thing, value, or lesson, which she received from an older people person, the student mentioned her granddad. At this point she again mentioned the alienated relations in the family.

MSS-08-Nina-30-1: *I think that they, above all, taught me modesty. My favorite memory is about granddad; I bring him slippers every day when he comes home from work, while other family members "hardly" noticed that he came home.*

The mother avoided answering the same question and talks about her early youth, when she was forced to be independent.

MSS-08-Irena-49-2: *… I had to be independent very early... as a young girl I earned money on my own, you know, when I was delivering newspapers. I was independent and that's obvious even today.*

A member of the 3rd generation had an interesting opinion about her self-esteem.

MSS-08-Olga-70: *Kapo di banda! (Laughter). I have my own car, my own money...I'm not dependent on others, others are more dependent on me… (Laughter).*

Mutual and reciprocal help between generations in the family is, in the opinion of interviewees, understood as one-way help, from older to younger generations in the family. All three interviewees speak exclusively about instrumental support, which is not mutual between generations.

MSS-08-Nina-30-1: *As far as I know, (material) help from grandparents is in our family provided only to one (of three) daughters. The other children and grandchildren do not receive help.*

The mother is also skeptical about learning from older people in the family. A member of the 3rd generation transmits her knowledge and experiences selectively to one of her daughters; she doesn't mention other, younger family members. From the selected case we can conclude that contacts between generations in the extended family are rare, alienation is predominant, and there is a shortage of warm and open relations. Interviewees experience mutuality as one-way process, going on from older to younger family members.

Connected family

A three-member nuclear family lives in a house in the centre of small town. Both grandparents live in the same community. Family members are tightly knit; contacts are daily as they live close. They trust and help each other financially and emotionally. They are also very close to their neighbors and friends, with whom they spend a lot of time on holidays and celebrations. At bigger events all the relatives and friends gather. Family members are very active in the local community.

The transmission of values and lessons from older to younger family members has been picturesquely described by members of three generations.

MSS-21-Anja-22-1: *Both grandmothers and grandfather contributed much that I became what I am, because they took care of me before I went to school. ... My grandfather gave me the most important life lessons... He says: be aware of the day when a sitting hen lays eggs in the afternoon, when judges will be beardless men and churchmen merchants.*

MSS-21-Katja-46-2: *From older people I have learned really a lot...older people have presented honesty as a value to me.*

A member of the first generation states that in the family there exists mutual and reciprocal help.

MSS-21-Anja-22-1: *Yes. When anybody from the family needs help, others spring to assistance. In good and in bad moments, during sadness or illness.*

A mother confirms that in the family there exists help from older to younger and the other way around and also a grandmother agrees with them. Grandmother states that she also likes to learn from younger.

MSS-21-Majda-65-3: *Yes. Since I remember there have been grandparents and grandchildren in our house. They've played together, worked and cooked together, laughed, and rested (laughing).*

From the answers it is clear that it is the connected family which cultivate intergenerational dialog. Family members who live nearby, unite a lot, mutually exchange instrumental, emotional, and informational support. It is the family, in which mutual help and intergenerational learning is comprehended literally; it goes from older to younger family members and all the way around.

Conclusions

From the case studies analyses we can comprehend the association between the frequency of contacts, communication, and intensity of relations between three generations and the transmission of values and reciprocal learning in the family. In the case of the family with strong connections between the members of three generations, mutual help is understood as something obligatory. In her research Strawn (2003, p. 57) has found out, that people with strongly knit family network are involved in occasional and informal learning inside this network and usually do not search for educational possibilities in the community. Our findings in strongly knit and closed family confirm these results. Uhlenberg in Mueller (2003) state that readiness to reestablish community ties and the patterns of activities in the community are carried on from generation to generation, but also influence social learning in the family. The findings from our research confirm that. In connected, to community open family, interaction is intensive and learning goes both-ways. Social learning, which goes on in the family, is closely related to interaction, communication, and the quality of relations in the family.

Analyses of the interviews show that in most families the 3rd generation transmits values, such as honesty, diligence, respectiveness, preservation of family tradition, as well as practical knowledge to younger generations. Quite some of the interviewees from the 2nd and 3rd generations state that they don't learn from their younger relatives. Some interviewees state that younger generations give them a joy of life, optimism and fearlessness, which go on spontaneously during everyday work

and conversation, by modeling or demonstration. On the basis of case studies analyses we can ascertain, that learning in the family truly includes cognitive, emotional, and social components (Illeris, 2004, p. 19). We have noticed that in families, where open communication and mutual help and learning are present, the 3rd generation accepts their position as positive (they are important, respected); where this is not the case, older members of generation explain their situation with ironic and bitter statements, for example "I'm a housewife and nothing more".

Learning and intergenerational cooperation in the family should be understood as a very important asset in building learning community, since learning patterns in the family very often influence learning patterns of individuals in the wider community (Strawn, 2003). As we've found out in our previous research (Jelenc Krašovec & Kump, 2009), learning is interactive and contextually placed; it is a form of social capital and for its creation social networks are important (Wenger, 1998). Learning as social capital represents the link between the micro, mezzo and macro level of analysis, i.e., between the individuals, small groups and the broader social structure. Deeper insight into the patterns of learning in the families - as a part of adult's informal learning – taking into consideration also their openness to the community, is important for planning the community intergenerational learning programmes. They are often the extension, but sometimes also the substitute for missing intergenerational ties in the families.

In Slovenia inhabitants still highly value the family and its social support networks (Hlebec, 2009). Our research confirmed that in spite of different intensity of contacts and relations in various families, generally in every family some kind of learning is happening.

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STUDENTS' VIEWS ON IMPORTANT LEARNING EXPERIENCES - CHALLENGES RELATED TO ENSURING QUALITY OF STUDIES

Abstract

In the process of assessing and ensuring quality university studies, students have an important role as partners in the learning community. In this empirical study we therefore analysed the learning experiences to which they themselves attributed a significant influence. We were interested in the type of those influences and the key characteristics of their learning experiences. The findings present challenges and guidelines for teachers when planning learning circumstances that may enhance the active involvement and joint responsibility of students.

Key words: higher education**,** quality of studies, quality assurance, important learning experience

Introduction

The University of Ljubljana defined itself in its mission statement as *»an institution striving for excellence in research«*. The absence of mentioning *»excellence in teaching«* was observed even in 1996 by a group of international experts in the CRE Auditors' report (Institutional Audit of the University of Ljubljana). The promotion criteria for university teachers are still based primarily on the quantity of their scientific production. We can therefore ask ourselves how the quality of studies is assured and in this paper, the Department of Educational Sciences, one of the biggest and oldest departments of the Faculty of Arts, will be scrutinized. The graduates of the department are trained to research educational theory and practice from pre-school to adult education. They gain the competences needed to develop educational science and resolve issues related to management in education. There are approximate 600 students at the Department every year. The undergraduate course in pedagogy and andragogy can be taken as a single subject or combined with one of the numerous other courses within and outside of the Faculty of Arts. Most of the classes offered take the form of lectures, with more seminars in years 3 and 4, but only few exercises in some subjects. Practical training is carried out over two consecutive years, each time for two weeks at various educational institutions. Our study does not include any students of the renewed Bologna programmes, which were first introduced in the 2009/2010 academic year.

Ensuring quality studies

Referring to the cognitive-constructivist paradigm and following Vermunt's (1993, p. 143) definition of *constructive learning* "in which students actively build-up their own knowledge by employing deep and self-regulated learning activities", we as professors have to ask ourselves whether during studies we provide conditions for such quality learning and enable students to get involved as actively as possible in the study process and thus gradually take control of their studies.

Nightingale and O'Neil (1994) stress that high quality learning will emerge in the following cases:

1. When a student *is ready (cognitively and emotionally) to face learning tasks*: it is necessary to obtain a proper degree of imbalance between demands and capabilities, between the difficulty of teaching contents and previous knowledge, so that students are prepared to accept a certain learning task as a challenge.

2. When a student *has reasons for learning*: students naturally perceive reasons for learning in achieving good marks and passing exams, so it is very important to plan an evaluation which will encourage them for high quality learning (when it is not memorizing which is primarily expected from them, but rather higher levels of knowledge). Most of all, it is important to ensure meaningful learning for them.

3. When a student will *clearly link the previous knowledge with the new knowledge:* the authors rely on Gibbs (1992), who maintains that without existing conceptions it is impossible to make new conceptions meaningful; therefore it is essential to include the existing knowledge and experience in the learning process. He also stresses the importance of a well-structured and organized knowledge, for which an active linking process of students is important.

4. When a student becomes *active* during the learning process: it is reasonable to assume that nobody can be completely passive during the learning, but there exist considerable differences in the activities of students. On the one hand there are activities like a detailed learning of explanations from the notes, definition of formulae and their reproduction; on the other hand there are activities demonstrating a student's involvement in the learning process (problem-solving, group work etc.).

5. When the *environment will offer a student a suitable support*: the authors maintain, that by this we first think of support programmes to develop particular learning skills and strategies as well as various counselling methods. But we should also bear in mind how to achieve a better flexibility by means of a more open learning and by planning possibilities for cooperative learning.

Students' role in ensuring the quality of studies

Student participation in quality assurance has become widely recognised in the European Higher Education Area. On their meeting in 2001 in Prague Ministers declared that students are important stakeholders on all levels and reaffirmed the importance of student participation in the "European standards and guidelines on quality assurance". However, the reasons for student participation in quality assurance, the ways of students' involvement and on which levels they should participate, has not been fully understood yet by all actors in all countries (Brus et. all, 2007, p. 53). A possible contribution to quality by students is often forgotten and neglected.

We would like to stress the importance of students' role in developing the academic community, the culture of learning, in cooperation with other members of the university staff. In order to create and support a culture of participation in all

aspects of university life, however, a continuous effort needs to be made to integrate new members, especially students. One of the most important goals of universities is to enhance students' learning. Students' involvement should be understood as full participation. This close involvement generates an authentic partnership and therefore more open dialogue (Alaniska and Eriksson 2006). The perceived importance of students' role in quality assurance is based on the *students' respected position in the overall academic community*. According to Harvey (2007, p. 84) "…quality culture is about adopting a self-critical reflective approach as a community: a community of students and staff. Quality processes, internally and externally, if they are improvement-oriented, should provide a framework for the effective operation of communicative learning environment." A definite purpose of this study is to listen to the voice of students and to find out if, during their studies, they start assuming a more active role by becoming increasingly independent learners.

Purpose of the study

With our empirical study we attempted to find out how students, after four-year studies of pedagogy and andragogy, perceive their own role and themselves as students. We were interested in how they define, at the end of their studies, some essential concepts of the professional field of their studies, such as knowledge and the roles of teachers and students. Of the many research questions, this paper only deals with the following: which learning experience they quoted as the one that influenced them most, what was the nature of that influence and the key characteristics of that important learning experience.

Method

In the empirical research we employed a descriptive and a causal-non-experimental method of educational research. With the causal-non-experimental method we mostly search for answers to the question "why", and explain causality of phenomena. The method is mainly used when we want to discover rules of a certain pedagogic phenomenon and, together with its description, also determine its cause-and-effect relationship (Sagadin, 1993). We attempted to include all the 4th year students of pedagogy and andragogy at the Faculty of Arts in Ljubljana at the end of their studies in the 2009/10 and 2010/11 academic years in our study. Questionnaires were applied in April and May 2010 and 2011; we received 69 completed forms. The questionnaire included multiple choice items, scales, open-ended questions and unfinished sentences. In the questionnaire we were interested in the following questions: students' satisfaction with their studies, how they perceived the main role of a student and that of a teacher, what was for them the essence of learning and the essence of knowledge, how they judged their own readiness for knowledge assessment, what influenced the most their conceptions of knowledge, learning, student's role and teacher's role, which learning experience they quoted as the one that influenced them most. This paper presents only answers to last of the open-ended questions that were categorized, on the basis of students' answers, in three groups depending on their contents. The data was processed with the help of SPSS for Windows.

Results and discussion

Important learning experience

Students were asked to recall, in any of their years of education, one learning experience that had a truly strong influence on them. They were asked to explain the nature of the influence and to describe that learning experience as precisely as possible.

54 students answered this question. Two female students answered that they did not remember any important learning experience. Only contributions of 52 students who gave their answers and represent 75.4% of the whole sample were further processed. Among them 94.2% (N=49) specified a positive learning experience and 5.8% (N=3) specified a negative one. On the basis of the answers to the open-ended question, we formed categories in reference to the origin of the learning experience and to its contents.

Answers regarding the *source of the important learning experience* were classified into the following categories, ranked according to their frequency:

1. Presentation of a seminar (experiencing a presentation of a particular subject, various forms of feedback information, active participation) – 25%.
2. Practical training (under their mentor's guidance, students come in direct contact with the work of a pedagogue and andragogue, they are included in direct work with pupils and other participants in educational process) – 19.2%.
3. Lectures (useful knowledge obtained from the lectures; learning contents that open several questions; regular attendance of lectures assists personal studies) – 17.3%.
4. Weekend seminars (they take place in a non-academic environment, promote socializing, students and professors get to know each other; their theoretical knowledge can be used in dealing with practical problems) – 15.4%.
5. Visits of institutions (visits to various educational institutions, institutions for children with special needs, rehabilitation institutes, prisons; forms of guided student fieldwork) – 11.5%.
6. Other: individual study, joint learning, e-learning, examination – 11.5%.
7. The teacher's personality (an entertaining teacher who makes a subject interesting; the teacher's clarity; the teacher supports students in forming their own knowledge and concepts; fairness) – 9.6%.

In students' opinions, presentations of seminars are therefore a frequent source of important learning experiences. They generally emphasized the importance of their experience of presenting certain contents to colleagues, of intensive and in-depth study for a successful presentation, of problem-oriented presentation, and they put a lot of stress on the possibility to get feedback on their performing. Especially precious was an opportunity of video feedback information and analysis of their performance at one of the subjects. This gives students insight into their strengths and typical errors, enables self-reflection, development of particular competences and performing skills, and allows them to overcome nervousness.

For every fifth student, important learning experiences occurred within their practical training, which they usually stress they want more of. It provides them a unique opportunity to experience their future work first-hand, to acquire work

experience with various groups of pupils, connect theory and practice, and verify the usefulness of theories in solving actual problem situations.

Considering frequency of quoted answers, lectures present an important learning experience for students. These lectures most often challenge them to think, discuss, deepen their theoretical knowledge, and open new questions. They are also aware of how important it is to attend lectures to prepare themselves for examinations and to connect different parts of knowledge into one. Last but not least, some emphasize their realization that some theoretical contents can be practically transferred and used in their personal lives.

Weekend seminars present an important experience as they make theory meaningful through practice and dealing with actual situations students meet in their practical training. Forming a suitable work climate is also important, together with relaxed relations and opportunities to meet and discuss things outside faculty walls.

A good tenth of students stress the importance of insights they acquired during visiting and attending various institutions. On such occasions, some of them clarified the role of a pedagogue or andragogue, experienced the problems of a specific area in practice (for example, working with prisoners), while other changed their point of view after meeting different people (for example in the Rehabilitation Centre for the Disabled) and now they are more aware of the precious "small matters in life".

Contents of important learning experiences and how they, in their own views, influenced them

Based on open-ended answers, we formed categories that provide deeper insight into the question of the content of the learning experiences that were important for students and how such experiences influenced them. Eight categories were formed, which are ranked according to their frequency as follows:

1. Connecting theory and practice (using theoretical knowledge in real-life situations; making theory meaningful in practice) – 25%.
2. Acquiring new knowledge and actual work experience (testing oneself in various situations; how to prepare well for classes; I experienced what it means to organize a learning event and how much energy is needed to carry it out; experience of individual work with pupils) – 23.1%.
3. Development of skills (performance, evaluation of one's own performance, self-evaluation, performing an interview, preparing a portfolio, carrying out field surveys) – 21.2%.
4. Open expression of one's opinion in a discussion (learning together with others and from others) – 17.3%.
5. Deepening theoretical knowledge (opening new questions, in-depth consideration, changing conceptions, revealing the essence, viewing the contents from different perspectives) – 17.3%.
6. A change of perceptions and/or actions (changed actions to achieve a goal; I prepare for exams in a different way; an incentive for additional education; higher study motivation; new meaning of studies; I changed my opinion of the world and of what is really important) – 15.4%.
7. Clarification of a pedagogue's or andragogue's role (getting to know the work and what I really want to do in my life) – 13.5%.

8. Disappointment (teachers' inconsistency; low grade in spite of work input; assessment criteria not clear) – 5.8%.

All the most often quoted aspects are closely interrelated. On the basis of the answers, we conclude that students, when answering open questions and challenges of the practice, find the constant intertwining of theoretical knowledge and its usefulness as well as acquiring new theoretical knowledge extremely important. Also important are learning experiences that enable them to develop the professional skills they will need in their future profession. These skills are developed primarily through presentation of seminars and experiences acquired at practical training during their studies. It is noteworthy that students think not only of their performance, but view as important skills more generally connected to planning, carrying out, or evaluating a certain activity, opportunities to develop listening skills and active participation in professional discussions as well as performing various techniques of research work.

Participation in discussions and deepening theoretical knowledge occupy the fourth and the fifth position in the frequency rank of answers on the contents of important learning experiences. Quality discussion clarifies the essence of a learning content and enables confrontation of different opinions, which contributes to a deeper understanding of the content. Moreover, students mentioned the importance of learning from others and with others as well as their awareness of their own contribution in a discussion, allowing them to constructively add to its quality.

Sixth in terms of frequency is the answer that students changed their acting or perceptions on the basis of an important learning experience, while at seventh place is the answer that their experience significantly influenced their professional identity. This most often occurred during practical training or when visiting educational and other institutions.

Three respondents reported that their important learning experience resulted in disappointment: due to unclear examination criteria, dissatisfaction with the grade or inconsistent criteria when performing their duties for a certain subject. All these three answers can be an important challenge for teachers when setting study requirements and conveying quality feedback that students need also (or especially) when they fail at assessments of their knowledge.

Conclusion

As the descriptions of important learning experiences quoted by students demonstrate, students need opportunities for their increased active involvement and responsibility in the study process together with challenges to connect theory and practice. Special care has to be given to building quality mutual relations and to organizing learning circumstances that facilitate confrontation of various opinions and participative learning. As Nightingale and O`Neil (1994) put it: when we start thinking of students as active participants in the learning process, sharing their experience with a teacher, or as partners in the learning process, we will more easily keep focused on creating circumstances which lead to quality learning. Within the context of ensuring quality university studies and vision of the university that strives not only for »excellence in research«, but also for »excellence in teaching«, the role of students as active co-designers of the studies has become indispensable. Finally, it is important for all university teachers to endeavour for quality through their

reflection of their own work, looking for feedback information from students, providing optimal conditions for their own work and creating university culture where students are increasingly co-designers of the study process. We are convinced that habilitation criteria which would take into account a more balanced ratio between pedagogic and research work may become a lever for higher quality university studies. After all, it is our professional ethics that bind all teachers to strive for quality.

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CAMPUS LIFE: THE IMPACT OF EXTERNAL FACTORS ON EMOTIONAL HEALTH OF STUDENTS

Abstract

This research explored the perceptions of students at a university campus in Gauteng South Africa on external factors that may contribute to their emotional (psychological) and academic functioning.

During a preliminary investigation, three students at a residential university voluntary came for psychological counseling sessions because of stress related issues. They were interviewed and it was provisionally determined that six external factors contributed to their stress and burnout. Although it started off with a qualitative instrumental case study approach the research developed into a pluralistic study. Group counselling was introduced to the three students as it was anticipated that sharing painful experiences might be more effective. An action research methodology was followed: factors realized as themes or categories during discussions, and the research was followed up by a quantitative method. Participants (89) from four universities were selected by convenient sampling to complete a questionnaire.

The discussion and conclusion on results will reflect some findings of the quantitative research where it may be considered in support of the qualitative research.

This article seeks to make both a theoretical and practical contribution to the knowledge of factors that impact on emotional well-being and academic performance of students. I will argue that the clarity of the association between a university learning environment and students' perspectives are often limited, because students' perspectives are seldom adequately considered.

Key words: Campus disruptions, learning environments, acute stress syndrome, burnout

Background

A study led by Gary Evans (2009), a professor of human ecology at Cornell University, N.Y., USA, recently linked childhood stress to reduced working memory function in late adolescence: "When a young person had high levels of stress-related hormones, they demonstrated reductions in working memory (basically short-term memory)".

According to another study done in Australia on students' perceptions (Lizzio, Wilson & Simons 2002, 23) reported students' strongest predictors of satisfaction in learning as the following: "A learning environment which was perceived as involving good teaching, clear expectations (clear goals), and allowing a degree of choice to pursue individual interests (independence)…". Basically, these include all factors conducive to teaching and learning. Yet many students all over the globe drop out annually because of personal experiences not related to the academe: most of them are highly intelligent and competent to achieve academic goals, but

emotionally unable to sustain their performance. Many blame this on negative personal experiences on campus.

Disruptions on campus goes back at least to the early nineteenth century in Europe and America when students complained about racism on campus, sexism on campus, no accessibility to certain courses and high fees (Williamson 2003, 22). Some students initiated disruption and others became vulnerable as disruptive behaviour on campus persisted. Only when they developed stress-related behavioural patterns, felt emotionally unsupported, did not attend classes, or developed health problems, would they either see a medical doctor or just dropped out. During 1807, more than half the learners on the Princeton University in the USA were suspended for "violent rebellion". Since federal funding made it possible for the enrolment of more learners, America moved from a few small colleges serving only the wealthy and social elite, to an egalitarian system of higher education. This prevented many human right violations, but on the other hand changed the cultural and social environment on campus to such an extent that it brought along emotional and social problems for students (Nichols 1997, 4-5).

In South Africa there have been numerous changes in the education arena since 1976 and in some cases, violent reactions and power struggles that almost paralysed higher teaching institutions during the years that followed: free expression against discrimination, protests, theft, physical attacks and sexual harassment. The merging of different universities and colleges caused many students and lecturers not being able to settle in to new campuses, time schedules, increased registration fees and new academic standards. To prevent chaos, the Green Paper's release allowed the government to send *independent assessors* to troubled campuses to investigate disruption and corruption (MacGregor 1997, 11).

According to Lizzio, Wilson & Simons (2001), university students' perceptions of their academic environment has a high impact on their learning approaches and outcomes. According to Brehm (1998, 40), the stress impact of not feeling safe in one's own study environment has a negative effect on concentration (cognitive ability and motivation), health and lifestyle. When people feel stressed they are less likely to stay according to their exercise programs, eat well, get enough sleep and be able to focus on a learning task. They may be more likely not to exercise, eat too much, abuse alcohol, caffeine and other drugs. Physically, they are more prone to high cholesterol levels, hypertension, artery disease and human immunodeficiency syndrome (HIV). Brehm (1998, 43) emphasised that stress may lead to depression, anxiety and phobias if people do not develop better ways to cope with it.

Earwaker (1992, 25) states that every situation of change could be considered as an experience of loss and understood on the analogy of bereavement: "...whether the event impacting upon the personality is loss of a loved one, or loss of a lifestyle…". The stress factors of a learning environment can thus be explained in terms of the analogy of bereavement.

The early-twenty-first-century brings a set of new experiences and personal and psychological problems that may predispose students to mental illness. It is not unusual for a university counselling and mental health center to diagnose students with anxiety, mood disorders, eating disorders, and lack of impulse-control, personality disorders, substance-related or other mental disorders (Sharkin 2006).

Student experiences in higher education

Disruptive students' behaviour directly or indirectly is visible in the influence it has on attendance of classes, quality of teaching and overall security on campus (Lamplugh & Pagan 1996, 3-11). Disruptive student behaviour in any form is often to the detriment of students who are preparing for their future, their examinations and their professions.

Lipset (in Siggelkow 1992, 12) describes students as vulnerable and often powerless, as they are "…in transition between having been dependent on their families for income, status and various forms of security and protection, and taking up their own role in the working (studying) community".

Acute stress reaction and burnout

Acute stress reactions are transient reactions to severely traumatised experiences that usually subside spontaneously once the stress is over within a few days or weeks (Van Niekerk & Vogel 2008, 9). Burnout is an intense form of prolonged stress with the result of emotional exhaustion, reduced personal accomplishment and affects the person to feel depleted of emotional resources (*Diagnostic and Statistical Manual of Mental Disorders,* 1994). Both acute stress reaction and burnout can be manifested in skin conditions, gastrointestinal disturbances, and upper respiratory tract infections as well as reactive depression, anxiety attacks and somatic symptoms like headaches, sleeplessness and other complaints for which no obvious organic cause could be found (Brom 2001).

Research methodology

The question to the factors contributing to stress in higher education, developed. The research was initially described as a case study: Observations on one campus over a period of nine months were made and three participants from the same university, who had personally experienced disruptive or violent behaviour, were interviewed. According to De Vos, Strydom, Fouche, and Delport (2003) interviews can be seen as follows: "Purposive conversations, essentially a technique or method for establishing or discovering that there are different perspectives on events other than those of the person who initiating the interview".

The aim was to determine the external factors that impacted negatively on students' experiences and perspectives. Individual counselling sessions were initiated by the students and the researcher was the psychologist. Confidentiality and voluntary participation were discussed when the need for group counselling seemed to be a better option. According to Buss (2000 in Shechtman 2007, 13) the greatest obstacle to happiness for young people is a lack of intimacy, loneliness and alienation. During group counselling members realized that they are not alone, unique or abnormal in their distress. According to Shechtman (2007, 13) group counselling can be defined as a group of at least 3 individuals and include any intervention that is designed to alleviate distress. The three individual students gave consent to participate in the action research.

External factors that were identified and demarcated as themes during group sessions were: sexual behaviour such as stalking; vandalism to personal belongings such as motorcars, stealing of cell phones, books and other personal items; loud

noises and interferences during lectures, resting hours or in the library; and a lack of respect for private space due to cultural differences.

With the themes identified, a questionnaire was compiled for further investigation of the topic by making use of a larger group: 89 university students from three universities in South Africa completed the questionnaire. The questionnaire contained structured and semi structured questions regarding language, gender, religion, free association, alcohol abuse, noise, hygiene, physical abuse, theft, smoking, culture, intimidation, table manners, privacy, vandalism, a healthy environment, physical attacks and sexual behaviour. The data capturing was done by the statistical research department at Unisa.

The questionnaire consisted of Section A: biographical information (such as gender, academic status and home language) and Section B where the participant had to respond to questions on possible violations in the following way: (one example)

Religion
        (Structured question):
Do you think that people's religious rights are being violated on campus?
 Yes /No
How seriously do you consider the problem?
Serious 6 5 4 3 2 1 not serious at all
        (Semi-structured questions):
Explain the problem and provide us with a typical example, incident or scenario.
Additional problems you would like to bring under our attention.

Findings and discussion

During my observations and interviews with students I found that problems were rarely simple and those interfering with successful studies were difficult to identify. However once a student was a victim to violence or disruptive behaviour, he or she would describe it as an emotional experience: "...violating my personal space" (Student A); "since being a victim of car theft, I am still a victim as I no longer have a car" (Student C); or: "I cannot get up in the morning ...I have no motivation" (Student B). They described stress and burnt-out syndrome symptoms (DSM IV 1994).

In the case of all three participants in this study, their experiences on campus were received negatively and impacted their studies. After student A met a student on campus who shared her bathroom in the hostel since the beginning of the year, she saw this student wearing her blouse she thought was stolen. Her trust in her fellow-students changed. Later she found the blouse in the bathroom and confronted the student who said she only borrowed it (without permission) and in her culture one should share. When student A missed more of her clothes, her purse and even class notes, she felt harassed and complained with the hostel body. Her experiences made her anxious; she developed sleeping problems and eventually felt unsafe in her environment. During the group discussions she received support from others in the group that shared her experience while group members could empathise with each other, although they had different stories to share. During group counselling, she

realised that campus life is only a mini-cosmos of the larger society, and she developed social coping skills to handle similar situations in future without stress.

Student B indicated physical attacks when she was walking from the library to her hostel one evening. Her purse was stolen and she was raped. The months that followed were described by her as: "...disastrous, I am unable to concentrate on my studies even though I had debriefing sessions at the police station".

Student C was driving on campus, when stopped by two male students who indicated they were lost. One opened her back door, grabbed her and took off with her motor vehicle. According to the questionnaire results, stealing, personal attacks (including rape) and harassing on campus seems to be some of the main reasons for female students experiencing disempowerment to such an extent that they suffer from stress reactions.

From the literature review two conclusions can be made. Firstly, human right violations experienced by students at university campuses are not isolated cases. In other countries where strong diversity of cultures exists, similar problems are experienced. However, the intensity and frequency of problems might differ to those in some of the residential universities in South Africa. Secondly, much of what the public know about human right violations on campuses, especially in South-Africa, are vague opinions of politicians or the reports of journalists in newspapers, which are seldom based on empirical evidence (MacGregor 1992, Ndlyana 2000, Mackay 2002, Letsoko 2005).

According to the remarks and examples of participants in the quantitative study, 38% felt they could not engage in high-level academic activities and/or develop into quality academics because of disruptive and violent behaviour of other students. For some (25%), stolen motor vehicles or the fear of vehicles that could be stolen prevented them from attending important lectures. For others (27%), loud music or other noises interfered with their levels of concentration and sleep. Although alcohol abuse and smoking were mentioned as average levels of interference by most, those who did not smoke or abuse alcohol themselves saw it as infringements on a healthy environment and it affected them seriously. For most of the participants, the main problems were the day-to-day irritations.

Conclusion

Some students may experience cultural differences as disruptive, invasive and even as violations to their human freedom, which make them feel disempowered. Some students' views of *self-actualisation* (to socialize, having fun, enjoying parties) may impact negatively on another's safety.

Often a student involved in family problems has less tolerance to interferences of personal space and disruptive campus behaviour than those from supportive families. Also, one student may have a personality that adapts easily to changes in social settings, while another may find this harder.

Gender, race, culture and language are not the only aspects which relate to campus disruptions. Factors such as noise, alcohol abuse and a lack of privacy do not draw much media coverage but have an impact on students' academic progress and emotional well-being on a daily basis.

Perceptions of teaching environments influence learning outcomes both directly (perceptions of experiences) and indirectly (perceptions on support services). Thus,

changes in teaching environments may have an impact on students' motivation and learning outcomes.

Generic academic and workplace skills are perceived to be best developed in learning environments characterised by safety and independence.

Comprehensive initiatives that incorporate the domains of psychotherapy, treatment, prevention, and outreach, should be utilised in institutions of higher education to sufficiently ensure that services are meeting the diverse personal and psychological needs of students (Langford 2004). Group counselling done by professionals, addresses issues related not only to campus disruptions but also to family relationship and personal dynamics, and is often more effective than individual counselling. Group counselling is an opportunity for practical training in social skills (Shectman 2007).

It is recommended that universities should prepare students by advertising support services. Colleges and universities should also disperse self-help and educational materials as well as employ standardized programs and interactive computer systems that support students who need information. Universities should outsource counselling services and develop a referral system to direct students to professional services offered in the community.

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EDUCATION AND LIFELONG LEARNING IN ROMANIA – PERSPECTIVES OF THE YEAR 2020

Abstract

Our research study focuses on the problems of education and lifelong learning in the Romanian society of the year 2020.

Starting from the idea that lifelong learning represents the continuous building of skills and knowledge through the life of an individual, we believe that the process of continuous education is the key element that each and every society should be based on. For us, as professors and researchers, the idea of pursuing knowledge out of either personal or professional reasons, has always been a main trigger of our activity.

The paper starts with an introduction on the subject of education and lifelong learning in which we have motivated our decision in choosing this particular theme and also which are the main objectives of our study; continues with a literature review part in which we present the studies that have already been made in terms of education and lifelong learning, focusing on the most relevant ideas of academics and researchers in our opinion; presents in the body of the paper the importance, the role and the stages of lifelong learning and the impact upon the education process; focuses mainly on a case study that we have made on Romania and the results of our research in this matter; ends with a part of conclusions and limitations that our paper has. For the case study on Romania, in terms of methodology, we have used questioners and interviews that we gave to a number of 200 adult individuals during the time period 2010 and 2011 on the topic of education.

Key words: education, lifelong learning, personal development, competitiveness, competitive advantage, technology of information, economy, economic crisis

Introduction

We have chosen the topic of education and lifelong learning, due to the fact that we strongly believe that the key of any successful and well trained individual lies in its potential to have access to more and better knowledge and continuously reinvent him so to say.

The objectives of our research paper are the following ones: firstly, to present some relevant definitions regarding education and lifelong learning, that specialists generally accept and agree on; secondly, to emphasize the importance, the role and the stages of lifelong learning and the impact upon the education process; thirdly, to show the stage in which the process of lifelong learning can be found in Romania and its future perspectives; fourthly, to express our own ideas and possible solutions concerning the evolution of our society in the year 2020, a critical time due to the economic crisis.

In respect to the methods and means that we used in our paper we can state the fact that for the theoretical part we focused on previous research papers, books and

studies belonging to academics, researchers and practitioners in the field of education; and for the case study part we used our own data gathered from a number of 200 Romanian adult individuals that accepted to fill in our questioner and participate in an interviewing activity conducted by us.

In terms of literature review, it is a clear fact that until now there have been done numerous studies on lifelong learning and education worldwide. However, our research brings more information concerning the view of Romanian individuals on this subject and also mainly focuses on the impact of the economic crisis on their learning planes, programs and future perspectives.

Literature review

Initial information resources were generated by performing a literature review search through academic and research well known data bases, such as ISI Web of Knowledge, Scopus, EBSCO, EconLit, REPEC, DOAJ, Cabell's, JSTORE, Science Direct, SpringerLink, ProQuest. Bibliographies were collected from a number of leading national and international specialists on the topic of education and lifelong learning. The primary source in terms of literature review was professional journals. It should be noted that the literature search focused on studies measuring the impact of lifelong learning and education system improvement mainly on students at the universities. Also, we focused on papers published in international conference proceedings, which took into account the topic of education and lifelong learning.

In this matter, Fies & Marshall (2006) focused on classroom response systems, Handelsman, Ebert-May, Beichner, Bruns, Chang, DeHaan, et al. (2004) made a research on scientific teaching, Huba & Freed (2000) gathered data on learner - centered assessment on college campuses, Keeney-Kennicutt, Gunersel & Simpson (2008) stressed students' resistance to teaching innovation, Nicol & Macfarlane-Dick (2006) focused on formative assessment and self - regulated learning, while Teunissen & Dornan (2008) were keen on the topic of lifelong learning at work.

Education and lifelong learning – a case study on the Romanian society

Research methods and data collection

The way in which our research method and data collecting process is done is crucial for us, as research economists. Moreover, the way in which we select individuals and institutions in order to hold our work and have relevant data in the end represents the key element to understanding our research evidence and its implications for policy and practice.

Sample and data collection

The data collection process implicated giving questioners and holding interviews to a number of 200 Romanian adult individuals, during the time period 2010 and 2011.

We have chosen as research tools a questionnaire and an interview session, both specially designed according to three final objectives: determining the current state of the lifelong learning process in the Romanian education system at the university level; showing the Romanian students perception on the real benefits of enrolling in such a system and emphasizing the Romanian students beliefs regarding the

usefulness and applicability of the information studied at the university in their future places of work. Of course, in terms of measurement items, some of them were adapted from specific literature where possible, while new items were developed according to the defined goals.

At the beginning of our research process, the questionnaire and the interview set of questions were firstly tested and revised accordingly. The testing was carried between January 2010 and December 2011, focusing in total on 200 Romanian students. The respondents were randomly selected, representing a diverse sample with 35% men and 65% women, with ages ranging between 18 and 60 years old.

The students chosen were from two Romanian prestigious state universities in a random order, respectively from all the three years of study. In respect to the subjects or disciplines students studied we can mention: business studies and economics, accounting, informatics, audit, controlling, public administration, marketing, management, sociology and teacher education.

As a general state of the research done, to each adult individual subjected to our research we have both given to fill in the questioner as well as answer to our interview set of questions. The questioners were distributed on a material support and were divided into two sections: the first section referred to the importance of lifelong learning for them and their own feelings towards such a complex process; the second section referred to their perception regarding the usefulness of the information gathered at the university until the stage they were in (the year they were already studying in). The questioner had also an introductory part for defining concepts which might have posed problems to the respondents, such as the notions lifelong learning, continuous education and trainings. The interviews aimed to help us create a clear image concerning the current state of the lifelong learning process in the Romanian education system at the university level. For us, the major debate issues where related to questions such as: can Romania be considered nowadays ready to adapt itself to the lifelong learning requirements of the European Union's programs; what are Romania's costs in terms of education in both public and private sector and can it be considered a country capable to support access to lifelong learning to the young generation.

Data Analysis and Results

The interpretation started from the data gathered by us and was oriented towards the following aspects:

- Correlation and percentage relation between the initial high school educational background and university studies;
- Variation in motivation in attending normal (mandatory) courses and trainings at the university level;
- Variation in motivation in attending supplementary (optional) courses and trainings both inside and outside the university level;
- Correlation and percentage relation between the education system and the development of the students;
- Correlation and percentage relation between job perspectives and aspirations and students educational background.

In terms of results, we can state the following aspects:

Firstly, in respect to the correlation and percentage relation between the initial high school educational background and university studies we have concluded that, in general, individuals tend to keep in mind the initial path chosen and go one the same trajectory, thus more than 75% of the respondents have stated that high school educational background and university studies are in the same field.

Secondly, in regard to the variation in motivation in attending normal (mandatory) courses and trainings at the university level, the data gathered is significantly different in terms of individuals motivation factors, thus students focused mainly on business studies and economics, public administration, marketing, management, sociology and teacher education attend the normal (mandatory) courses and trainings at the university level in a significant percentage, respectively 65% from the total of individuals studying one of these disciplines, while students focused mainly on accounting, informatics, audit, controlling attend the normal (mandatory) courses and trainings at the university level in a lower percentage, respectively 35% from the total of individuals studying one of these disciplines.

Thirdly, in regard to the variation in motivation in attending supplementary (optional) courses and trainings both inside and outside the university level, the data is a interestingly reversed from the one at the send point, thus students focused mainly on business studies and economics, public administration, marketing, management, sociology and teacher education attend the supplementary (optional) courses and trainings at the university level in a significant percentage, respectively 25% from the total of individuals studying one of these disciplines, while students focused mainly on accounting, informatics, audit, controlling attend the supplementary (optional) courses and trainings at the university level in a lower percentage, respectively 85% from the total of individuals studying one of these disciplines.

Fourthly, in terms of the correlation and percentage relation between the education system and the development of students, from the total of respondents, only 35% of them believe that the Romanian educational system will provide them the necessary background and future knowledge in order to gain access to a good job and will ensure them a better development process, meanwhile 65% believe that the Romanian educational system does not provide in all cases up to date information, especially in fields in which information is perishable, such as economics, business, informatics, information systems, accounting, audit.

Fifthly, in terms of correlation and percentage relation between job perspectives and aspirations and students educational background, the data collected showed the first place is occupied by students that study accounting, informatics, audit and controlling, due to the fact that 95% of the students belonging to these fields feel extremely confident in finding a job, mainly because of the high applicability of the knowledge gained especially threw courses and private trainings, the second place belongs to students studying business and economics, marketing and management, due to the fact that 75% of the students belonging to these fields feel confident in finding a job in the next future, the third place belongs to students focused on fields such as public administration, sociology and teacher education, due to the fact that 55% of the students belonging to these fields feel less confident in finding a job in the next future.

The interview that we carried out in the same time as we asked for answers to the questioners was based on open questions aimed to help us create a clear image concerning the current state of the lifelong learning process in the Romanian education system at the university level. Trying to find concluding answers to three basic questions: a) can Romania be considered nowadays ready to adapt itself to the lifelong learning requirements of the European Union's programs; b) what are Romania's costs in terms of education in both public and private sector and can it be considered a country capable to support access to lifelong learning to the young generation; c) can Romania be considered a lifelong learning continuously adapting society, were our main targets.

Conclusions

In terms of results, for the first question asked during the interview, 55% of the students felt confident enough in stating that Romania is ended on the right track, and can be considered nowadays ready to adapt itself to the lifelong learning requirements of the European Union's programs. As arguments, the most frequent ones where related to the assumption that Romania, being part of the European Union, will be mainly forced to focus on the general requirements of an already opened and free labor market place. Moreover, for the second question asked during the interview, 90% of the respondents believe that Romania does not really invest in the young generation. The main arguments that students brought into discussion where related to the ideas that by law the budget places are less and less each year (in the state education system, of course), compared with the tax places, which clearly restricts access to university education for some individuals; the foreign exchange programs for students are more and more restrictive, and due to a limited and insufficient budget right from the start, only some students have access to these programs, and not in all cases the best of them; the normal scholarship and the merit scholarship provide a symbolic sum of money to real talented and hardworking students, meanwhile a student that has chosen in turn a part time job is clearly more advantaged, both in terms of money and in terms of future options for getting a better job in the future. For the last question asked during the interview, 25% of the respondents believe that Romania can be considered a lifelong learning continuously adapting society. One great concern showed by the majority of the respondents at this point referred to the fact that Romania cannot be considered in their opinion a secure environment in terms of almost any law continuity, economic and business trends, education agenda and curricula, financial and labour market and the list can easily continue.

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SCIENTIFIC REPUTATION AND "THE GOLDEN STANDARDS": QUALITY MANAGEMENT SYSTEM IMPACT AND THE TEACHING-RESEARCH NEXUS

Abstract

In the academic environment the reputation is linked to research performance. However, the questions "what reputation actually is, how it is formed and which are the best ways to measure it?" still remain and they raise tension and confusion between academics. The evaluation methods tend to over emphasise research and fail to address the quality of teaching, mostly because measuring teaching quality is complex and difficult. Teaching matters in higher education institutions (HEIs) and the quality management system must be committed to capturing all the dimensions that affect quality teaching.

Introduction

Today, higher education institutions focus on the investigation and analysis of the concepts underlying the notion of teaching and research and their connexions to Quality Management System (Jenkins, 2000; Woodhouse, 2001; Jenkins and Healey, 2005; Trowler and Wareham, 2007). As a feature of the recent year, HEIs have placed a greater degree of importance on reputation (prestige) than on improvements in academic performance. Many institutions have implemented various ways to measure and analyze performance and value.

The subject of this paper is a small part of a comprehensive research project 'The Academic Profession in Europe: responses to societal challenges' (Euroac/2010). The scientific results discussed here are part of an extensive report aimed to assess and compare the QMS current stage (significance, implementation issues, organizational benefits, research *vs*. teaching, students' implication, standardization, cross-institutional assessment and satisfaction) from an individual and institutional level. This study is correlated to the state-of-the-art in partner countries and it taking into accounts the background information about the socio-political context in each country and how the individuals perceive the quality assurance system and the effect of the implementation of quality management systems at individual and institutional level. It explores the effect of the quality assurance and quality management system on the academia in HEIs across the eight countries which are members of the Euroac project. It is drawn on a series of face-to-face interviews with senior university managers, academic staff (both junior and senior), and other Hepro staff spanning both the 'hard' and 'soft' sciences.

The present study provides the academic staff's perception on the nexus teaching –research from the QMS point of view and shows their priorities compared to the priorities of their HEIs. It details how university quality assurance imposes, influences and changes the performance criteria in teaching and research in all their dimensions and complexity. This proves the importance of the QMS and how research outcomes and ranking matters affect universities.

Interview Methodology

The analysis is based on data gathered to accomplish a cross study on the influence of the European governance in the countries involved in the EuroHESC project Euroac – The Academic Profession in Europe: responses to societal challenges (Germany, Austria, Switzerland, Ireland, Romania, and Croatia as Principal Investigators and Finland and Poland as Associated Partners). In our analyse we focused on the themes cover quality assurance and quality management system. The data are based on the results from interviews which were conducted in Romania between February and May 2011.

Face-to-face interviews produce higher response rates, but this modality is usually costly and often laborious. The determinants of response rates for face-to-face surveys are: the length of the questionnaire, the topic of the survey, and other design properties.

During the data collection action, we interviewed members of the management boards of HEIs and members of the academic staff in both junior and senior positions and we asked them about their perspectives and their views on expectations coming from their professional environment and from society, about their self perception about their current activity either as teachers or researchers either as managers or administrators. Also, the interviewees are asked to give their perspective on governance (the perception on the structures they are working in, changes, level of influence and their degree of control over their work and time, pressure and obligations), academic career (the pathways of academic careers, characteristics and job satisfaction) and professionalisation (re-configuration of job tasks, who ask for professionalization and its influence on academic work). Three members of the project team, namely Austria, Finland and Romania are deeply focused on the governance theme and the Romanian team is in charge of analysing the impact of the quality management system on academic work.

Following this work division in the interviews, we wanted to check the understanding and the interpretations of academia life, challenges and changes posed by the quality assurance, quality evaluation and quality management system. We used purposeful sampling for both the interviews and document analysis (another reported survey, research papers in the field and legislative frame), in order to find more information.

Due to the large amount of data (more than 489 interviews) in analysing data, we used the "meaning condensation" technique. This technique condenses the data from interviews into "main themes" and it allows us to combine the essential themes into descriptive statements. The main themes are direct statements extracted according to the interviewees' responses that are considered to be more meaningful to the central areas of inquiry.

Sampling of Interviewees and Interview Procedure

Overall, the Euroac team interviewed 489 as following: Romanian team 69, Austrian team 60, Croatian 60, Germany 60, Irish 60, Polish 60, Finland 59 and Switzerland 61. These are members of the academic staff covering all the academic position, managers in HEIs as we are trying to keep balance in gender issue. Also, Hepros were interviewed.

For the Romanian team, more than half of the interviews for academic staff were conducted in their respective offices being face-to-face interviews. The rest of the interviews were conducted on the telephone. This was due to financial reason and the difficulty to cover long distance. The length of all interviews spanned between thirty minutes and one hour and twenty minutes. Prior to the interviews, we made appointments and explained to the interviewees the purpose of the interviews in the wide context of the Euroac project. There were some unexpected events when some interviewees could not meet the schedule for interviews because of unforeseen reasons.

All interviews were conducted in a structured way following the interview schedule and all the interview proceedings were recorded on tape.

Finally, all interviews were carefully transcribed in order to ensure that interviewees' ideas are recorded to constitute raw data. Then, in order to allow the team of the project the access the data, the interviews were carefully translated in English.

Discussions and Conclusion

Martin and Stella (2007: 45) refer to two pillars of quality in education, namely "the golden standards" and "the fitness for purpose". The first approach states that it is possible to identify certain qualitative key aspects of HE quality. The second approach assumes that a wide variety in types and objectives of HEIs makes it almost impossible to establish quantifiable criteria or standards. However, during the last years the necessity to cope with quantitative data in order to compare the performance among individuals, departments and institutions leads to introduce a quality rating mechanism related to performance in research (peer review as qualitative judgement and the number of publications in highly ranked journals as quantitative judgement). At the same time, they fail to introduce similar quantifiable criteria to assess teaching.

The main problem of the QMS is that its main focus is to measure research activities and research outcomes and not teaching quality. The interviewees view the publications as a measure of academic quality and prestige and this forced the academia to change their focus from teaching to research in order to succeed in academic environment. However, most of the interviewees disagree and blame that their HEIs aim to rank as high positions in international rankings or to improve their position in the rankings instead of focusing on their main missions. In this context, in the respondents' view the indicators measuring teaching quality are strongly questionable, far more than the ones measuring research. The respondents' consider that the assessment mechanism works better, is more accountable and objective in research than in teaching. The teaching quality evaluation is a complex process and, at the same time it is subject to unavoidable subjectivity. The main drawback consists of the lack of mechanisms to track the effects of teaching evaluation on education quality improvement in a university and proves that it is adequate making managerial decisions based on evaluation results.

Another important issue comes from social sciences and it states that it is necessary to enlarge the indicators for assessment including books, which are immensely important for social sciences and the arts and human sciences. Also the respondents outlined the necessity to realize the cross-institutional assessment

(ranking/rating, benchmarking, quality assessment) as useful tools to identify those proper actions for developing institutional policies.

From the political authorities and institutional leaders' point of view, the massification of higher education makes it much more visible and also changes the managerial vision and academic autonomy. This has resulted in strong demands to make universities more effective and more accountable. Research has experienced a similar growth. Research, scientific values and high pressure for research outcomes affect the academic staff's notions about what research and academic activity is all about.

A large number of respondents perceive a clear difference in academic prestige between a teacher and a research professor. Our study reveals huge divergences between the identity of many of the academic staff respondents and their role. Even so, the majority of the respondents claim that they are both teachers and researchers; in reality, their academic role has been rerouted to a more research based one. "Teaching" at HEIs is more than providing a learning environment. Trowler and Wareham (2007) highlight as negative or as drawbacks (termed as "dysfunction") when referring to "teachers doing research" is that time and energy of the academic staff have been devoted to research that sacrifices teachers' involvement in teaching and are replaced by teaching assistants (commonly, post-graduate students). This raises conflict among the students that become reluctant to receive lower level of expertise, feeling neglected by the academic staff and the department.

Nowadays, the academic identity and status are closely related to research and scholarly activities. The reputation and successful career path encourage and almost impose a sound engagement in research and publication work. This is necessarily equivalent to a narrower but more performance and quality audit-driven definition of research focused on obtaining grants and publishing in peer-reviewed outlets. Institutional responses to national and international trends in higher education have led to a strong emphasis on research performance monitoring. Some of the respondents perceive the elements of conventional academic practice, such as personal tutoring and assessment, as being time-consuming activities. They need to be released to pursue work that is considered more 'productive' as publication and grant-getting targets.

The respondents feel that it is getting harder and harder to perform all the elements of academic practice and find themselves under increasing work pressure and lack of time for personal life.

A general impression that emerges from this analysis is that in order to make the higher education system more competitive, universities have been under tremendous pressure from governments and the internal and external stakeholders to restructure and reinvent the education systems. According to Carnoy (2000: 50), education reforms within the context of globalisation can be characterised as finance driven reforms emphasising decentralisation, privatisation and better performance.

The growing impact of globalisation in the higher education system has forced many countries to reinvent their governance strategies in education for coping with the rapid social and economic changes. Regarding the impact of the standardization demands and the new holistic assessment criteria of the academic staff's activity on the university management vision and strategy, most of the academia believes that

the government and the university management have to react to external pressures generated by globalization.

Following the new vision and strategy imposed to quality management system in HE, many changes are implemented allowing the governments to shift to the roles of regulator, enabler and facilitator instead of those of provider and funder. The academic staffs are forced to make them visible to their co-operators outside the university and they need to focus on quantified research outcomes such as publications in prestigious journals.

Because there is great emphasis on 'efficiency and quality' in higher education, universities now encounter a lot more challenges, and are being subjected to an unprecedented level of external scrutiny. The growing concern for 'value for money' and 'public accountability' lead all providers of higher education to accommodate increasing demands from the local community, as well as changing expectations of students, parents and employers. Nowadays, the governments are facing increasing financial constraints and in order to create more higher education opportunities, modern universities have started to change their model of governance by adopting the model based on scientific performance using the international classification criteria and standards. But it is essential that these classifications do not become an objective in itself for a university but rather they may be a consequence of its mode of organization. In the opinion of many respondents a dangerous tendency is that universities lose sight of something essential in the evaluation of teachers, namely the teaching performance; the evaluation criteria currently rely more on research, reflected in publications in recognized international research journals, so-called ISI publications.

The most critical issues related to the QMS implementation include: procedure development, lack of financial resources and information, and the development of work guidelines, while improved responsibility and *organizational performance*, were perceived by the respondents as the key QMS benefits. QMS is a coordinated aggregate of interrelated and interactive activities that determine quality policy and objectives as well as provides the teacher and also the research activities with guidance and rules in their goal attainment. The implementation of quality management systems enables HEIs to define and manage processes that ensure delivery of services that meet internal and external stakeholders' needs and expectations.

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THE IMPLEMENTATION OF THE VALIDATION OF ACQUIRED EXPERIENCE (VAE) IN FRANCE WOULD BE A CULTURAL REVOLUTION IN HIGHER EDUCATION TRAINING?

Abstract

This contribution shows the conditions of a change of prospect in higher education which is based on institutional and policy positioning in favor of the implementation of the devices of Validation of Acquired Experience (VAE) which is used to deliver a whole or components of a qualification (certification) on the basis of the knowledge and skills of the applicant acquired through experience, and on the initiatives of the individuals in education and the formation throughout their life. These devices appear in the political discourses like a new appropriateness of access to certification and recognition of a right qualification taking into consideration competence acquired during "the courses of experience". Nevertheless, the intention of social justice and equity, is it compatible with a reduction of the costs related with the courses of continuing education by the process? If the public policies do not contribute as much to the resolution of uncertainties economic and social perceived by the questioned actors that the political discourses it suggest, it is because the device reveals new sources of socio-cognitive conflicts and a modification of the representation of the professional paths of the candidates. However, a cultural revolution in higher education training could precede with acceptance by the educative community of higher education (the teaching researchers) while considering the "conscientisation" necessary, it means of transmitting a know-how, an attitude and a knowledge – all these being the foundations of the candidates' skills – the difference between what the candidates believe they know and what they actually know, finally to question the candidates about the antinomy between legitimate and illegitimate knowledge, all these have to be present in the candidates' reflection, without their being necessarily aware of them.

Introduction

Since the second half of the 20th century, all the functions within higher education training have been solicited by a general layout placing economy as its foremost organizer. Consequently, the model of higher education training under study here is based on an innovating educational scheme allowing the combination of two other means of access to qualification: continuing training and the VAE, both constitutive of the offer of renewed modular training. This new model is situated at the frontier between action and knowledge, between past and present, and it stirs up new interrogations as to knowledge acquiring and practising, as well within institutional academic contexts as without (Neyrat, 2007). In that sense, we are led to make the assumption that, if the actors of the VAE, whether they are teaching researchers or candidates to the VAE, seem to resist, for some of them, or to renounce, for others, it is because they feel confronted with overwhelming

difficulties, based on their relationship to knowledge inherited from their partly personal, partly collective history.

Our analysis is based on the methodological procedure of the participating observation of four experimental groups (25 students) at Master's Degree level, and four teaching researchers working inside this scheme. The analysis focuses on the study of representations, on an educational engineering work, on postural changes between the assessed and the assessors, on the candidates' validation files, knowing that these candidates can be granted extra training modules in order to earn the targeted qualification.

Higher education process and lifelong education

Building up a lifelong educational and training continuum is a widely shared prospect, even if the changes it calls for mean an evolution in higher education training that raises both interest and concern. How can the borderlines between initial training and continuing training be progressively erased? How is it possible to go from logic of a piling-up of levels, of a juxtaposition of numerous courses, to one of continuous curricula that encourage ascending personal and professional careers, with a real visibility for the people concerned? However, by laying too exclusive a stress on individual responsibilities at the expense of the part and functions traditionally attributed to institutions, public authorities and corporations, a liberal conception could impose an understanding of lifelong education as associated to concerns for the risks run by the finality of social cohesion (equal opportunities and access to training, the fight against inequalities) – which is at the heart of the European social model, in conformity with the Lisbon strategy and the European social agenda.

Principles that now weigh on higher education training

The very fact that a diversity of formal, non formal and informal lifelong educational and training paths are said to exist and the way to acknowledge and confer them the same social value are considered by the teaching community as a major advance. Recognizing and validating each of them must be implemented in order to encourage overpasses to an access to employment and to degrees and qualifications. These measures are more liable to be an answer to the recurrent issue of the fight against inequalities, thus referring to the principle of an equal access to lifelong education and training (Lafont, 2011).

The implementation of the VAE linked to continuing training should produce a positive effect on a greater incentive to train oneself. All the potentially interested individuals should, from now on, be offered this opportunity – more specifically those whose skills are not attested by a corresponding qualification – whatever their age, sex, career, place of residence or the time when the issue of this recognition arises. For training and certification organisms – among these, universities – the issues and challenges, as far as recognition and VAE are concerned, extend to the « *six million working people – among whom many potential beneficiaries with low-standard degrees, more specifically, those who have, or have had, receding jobs (reconversion) – who have known but precarious careers on the work market (young unqualified temporary workers) or who target 'regulated' professions* » (Besson, 2008).

Orientation should give access to careers for the benefit of the students, as well as of the universities and their partners.

The ambiguity of certain orientation

While higher education knowledge and scientific culture are essential mainstays of life in society, the objective of a raise in the training standards – more particularly, academic standards – cannot be reduced to a global increase in the efficiency of the production system (De Montlibert, 2004). This issue has been forcefully broached by higher education professors who campaign in popular education movements, for example, along with most trade-unions, as much as higher education staff members and salaried employees.

However, thanks to the VAE and to the innovating scheme associated to it, there is here the beginning of a major answer, even if there is no guarantee that the degrees awarded in initial and continuing training and by the recognition of experience have a real impact on the material and professional conditions of the people concerned, nor that their wish to get trained always ensures them financial results. Some of those who advocate this scheme consider that it would help the candidates to « *gain time and spend ten times less than a classical training* » (Vilchien, Audige, Debeaupuis, Segal, 2005).

Linking the Validation of Acquired Experience and continuing training

The VAE is one of the fundamental elements of the 2002 law on social modernization[1]. It is a right providing the opportunity to convert personal experience, whether it is professional or social, into a degree, a title or a professional certificate. Indeed, these measures « *make it possible for anybody who has been active for at least three years to validate their experience with a view to getting a degree or a title with a professional finality* »[2]. These measure change the traditional pattern in which certification was the ultimate award of a higher education or professional training. From now on, learning through professional and social experience, in the widest sense, makes it possible to acquire the knowledge, a know-how, and a way of existing and certain habits (Dubar, 2001). It can perhaps also be considered as an equivalent for training, thanks to the awarding of the same attested and recognized certification.

In the scheme under study, when candidates, student-trainees, fail to get their complete degree within the framework of the VAE, they are prescribed extra training modules, within the framework of continuing training, so as to obtain the complete degree. This scheme calls for changes coming from the innovation it causes, thus accounting for the numerous initiatives that have been taken to meet the emerging social demands that the candidates crystallize. In fact, social innovation produces the interactions and inter-organizational relation-ships through which new institutional norms can emerge. And the achievement of the innovation process would mean the upsetting of social norms and the creation of a new normative framework (Alter, 2002). Consequently, a change in higher education ethos is taking place.

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[1] Official Journal dated 28.04.2002, decree nr. 2002-615 (26.04.2002) taken for the enforcement of article 900-1 of the work chart and articles L.335-6 of the education chart.

[2] Art. L.900, paragraph 4 of the work code.

The teaching researchers

Recognizing knowledge acquired through experience implies a deep change in the shared representation of knowledge that higher education members have built all along their own careers, in reference to knowledge elaborated through studying and teaching. But isn't the issue then an opening up of the teaching researchers' functions, of an extension of the missions attributed to universities, making them accept a notion of training that forces them to widen their skills as regards the teaching and monitoring of practitioners? In view of the profiles of the teaching researchers in charge of the development of the scheme, among « *the indifferent, the proselytes and the activists* » (Cherqui-Houot, 2001), an isomorphia between the characteristics of the careers and professional histories of the teaching staff invested in continuing teaching, and the characteristics of those interested in the VAE, seems to take shape for those who have a particularly well-developed knowledge and experience of candidates concerned by the VAE. However, practising the VAE calls for an « *educational adjustment* », opposed to the traditional forms of the « *knowledge-power* » equation, where the relationship between teachers and learners is known to be strongly inegalitarian (Benhamou, 2005). This makes it necessary to pay renewed attention to the modes of assessment.

However, the possibility to deliver a complete higher education degree seems liable to modify the « *principles of degree awarding and the social part played by these degrees. In the same way as the notion of skills* (Tanguy, Ropé, 1994), the extensive use of this notion tends to « *modify the cognitive and cultural models that prevail in the higher education sphere* » (Ropé, 2005). Mobilizing individual and collective knowledge and experiences can allow VAE candidates to share and acquire the problems encountered all along their exchanges, in order to overtake them, and finally produce a new shared knowledge, the basis of their validation project. In that sense, the VAE contributes to a new reflexion on learning in order to create a moment of cooperative production and exchanges during which the candidate is at the centre of the learning process. Thus, all along the VAE process, the examiners are to make assessments « *no longer according to their own teaching, but to the evaluation of action-produced knowledge, outside their own sphere of influence. This new posture changes the very representation of the degree in question as the achievement of an intellectual career, and thus as what can also be considered as the outcome of an active career* » (Lenoir, 2002, pp. 91-108). Therefore, can this significantly undermine the power that the teaching researcher, partly consciously, exerts? Could it be one of the unspoken reasons of the resistance and misunderstandings at the origin of tensions and conflicts within the University, where implementing these VAE measures is accompanied by «*an attempt to recompose hierarchies and new forms of domination* » (Ropé, 2005)?

The VAE candidates

In the case of the higher education training model, in which a large part of the assessment system is based on the cognitive skills of analysis, synthesis and writing, the validation project – the corner-stone of the VAE scheme through which the candidates describe their professional and social experience – is meant to prove skills supposed to be up to those attested by the targeted diploma.

The analysis of practitioners' remarks as to the measures concerning the Recognition and VAE makes the process appear too cumbersome (Mlekus, 1998); it demands true cultural prerequisites and makes those candidates who are least familiar with written procedures tributary of its complexity. The misleading aspect of a certain autonomy given at University by the validation project implies a more personal investment as to its written form and calls for capacities of document structuring that not all the candidates possess.

Their perspectives all carry social and economical issues. They express their motivations in terms of a vocational re-orientation, of a new job, of an easier access to employment, of earning a degree, of reaching a high training standard, of widening their field of knowledge, without admitting that there is a correlation between the factors of success of the process and the motivational elements that underlie their company. Thus, the acceptation of the constraints and suffering with which the candidates are confronted is proportional to the issues they have identified. Therefore, they, partially consciously, define a limit of profitability beyond which – if the material or symbolical benefit they can get does not correspond to their expectancies – they momentarily or permanently abandon the process. Among these constraints, those linked to the language rules and the interiorization of those of writing set the candidates back to the conditions in which they have acquired them and to those of the use they know now.

This infers observing the training and qualification standards of the population under study, and consequently, noting that the social and economical conditions of acquiring and using language skills are in direct relationship with their school days and that the standard of language incompetence is correlated to an incomplete learning subsequent to unachieved careers.

Conclusion

This study on the motivations and measures at the origin of the implementation of the VAE process questions the ethos of higher education teaching researchers, as well as the freedom of movement the VAE candidates have in order to become the actors of their future, although they are not totally aware of all the constraints they are confronted with all along the process. It is thus possible to see to what extent the VAE process is a higher education training model within the framework of lifelong training. However, it is now a fact that the awareness of the difficulties the teaching researchers meet, on the one hand, provokes reactions liable to create new sources of conflict ; on the other hand, whenever these difficulties emerge for the candidates, they tend to cause either inhibition or a partial or even total dropping out of the project. This accounts for the fact that there is a gap between the number of potentially interested candidates and the number of those who finally get involved in this recognition project. Only an « élite » or too few of them still seem capable of taking possession of the opportunities universally offered to access to it, as is confirmed by the first studies. Therefore, cannot it be inferred that the law favours those who have best integrated the norms and expectancies of the system, in order to convert their investment into a material and symbolical profit? The law of social modernization and the articles concerning the VAE have found a legitimity in view of social expectancies. True, some of these are founded on painful experiences. But the Cultural Revolution in higher education training seems to lie in the law's

predisposition to make individuals the actors of a promising project, that they can dissociate from their present day situation, provided they are capable of a reflexive process, though this is not explicitly expressed to them.

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TRANSITION OF STUDENTS FROM ECONOMICALLY DISADVANTAGED BACKGROUNDS TO RESEARCH LED UNIVERSITIES

Abstract

This paper presents the findings of a study on software development students from economically disadvantaged backgrounds that have dropped out of universities which have a strong research emphasis. In the UK, these universities are generally part of the Russell Group of Universities. The participants were all male, mainly black, working class and had studied software development for two years post-sixteen at an inner city further education college in London. This study is the result of interviews, discussions and feedback from students who have a very different experience of the higher education system than students from middle class backgrounds. As Macrae and Maguire (2002) have argued, a system of support is required for these under-represented groups, in order that they may successfully access and complete higher education studies.

Economically disadvantaged students' transition to research led universities is especially difficult, as in these environments there is a habitus of middle class students for whom the social norms are very different as many have had very different life experiences. The dramatic increase in University fees from £3,000 to £9,000 per year has made many economically disadvantaged students worry about applying to university. It is also the case that students from the lower social classes are more debt averse than those from higher social classes (Callendar & Jackson, 2005).

While many universities have made considerable steps to assisting transition, the findings are that these working class students who came to university from a vocational course and have very limited experience of exams, believe that they would be helped by having an introductory course at the start of the academic year to give additional support. A mentor from the same social, economic and ethnic background to support them from the start of their course would also be of great benefit. It is noted that additional financial help in the form of more non repayable bursaries and available part time work at the university would also be beneficial.

Introduction and Background

This paper is an investigation and study on the reasons for drop out of economically disadvantaged, mainly black, male students from research led universities. The 15 students in the study were all male: there are very few females on this course each year and they generally apply for Business Information systems courses, so they were not included. The students were mainly black and were all from economically deprived homes. They were in receipt of EMA (Education Maintenance Allowance) which is given to students whose families are in receipt of a low income, so this was used as an evidence indicator of economically disadvantaged background. They were all at a London inner city further education college on a vocational software development course, which is the equivalent of three A Levels - the necessary prerequisite for university. UCAS, the university and

colleges admissions service, which is the centralised application system for UK universities advises that there has been a drop in applications from UK born students of 12% (UCAS 2012) since the news of tuition fee increase which will come into effect from October 2012. With the projection of the number of 18 year olds in the UK decreasing by around 11% over the next 10 years it is important for universities to continue to have in place as much student support as possible for students to reduce the dropout rate.

From October 2012, university fees in the UK for home students will increase from £3,000 to £9,000 per year, which means an economically disadvantaged student who drops out incurs a heavy financial loss with nothing to show for it. The dropout rate of working class students has been recognised as a serious issue in higher education. Powedthavee and Vignoles (2009) suggest that, in the UK, as in the US, there is a significant gap in the dropout rate between economically advantaged and disadvantaged pupils. Powedthavee and Vignoles (2009) state that the dropout rate is increasing in the UK and that this will widen the socio-economic gap in degree completion, as poorer students will be more likely than richer ones to drop out. However many universities have taken some steps towards supporting economically disadvantaged students and this has been noticeable in the feedback of this study. If a student goes to university it is critical that they do not drop out, especially as there are very few jobs available in the current economic market in the UK. '*In the period September-November 2011, 1.04 million young people aged 16-24 were unemployed' (*Rhodes, 2012, p. 1). On average 85% of all students who complete this software development course go on to attend university. Nearly all are the first in their family to do so. The concept that this course will lead on to university is embedded into the teaching. We keep in touch with the students to monitor that we are properly preparing them for university. We also get feedback from them on their experiences at university through discussions.

Everyone should have equal access to a university education. Rawls (1971) sees social justice as the equal distribution of goods in society. Here the goods are the availability of and access to university education. Bourdieu (1990) has described how we reproduce our social conditions and so children frequently have similar educational and employment opportunities to their parents. This research shows that there is a correlation between background and education but, this is true only up to a point. Bourdieu's (1990) concept of habitus accounts for how a person's environment influences their behaviour and choices. This can be both familial and institutional. In this study, one can see how habitus can affect students. Most of those who participated in the study do not have a familial habitus of going to university; the majority did not have parents who wanted them to go or assumed that this would happen. Nearly all the cohort were the first in the family to go to University. For disadvantaged inner city students who may only have been out of London on school trips this is very alien, they go from a world of slang to talking '*proper*', from rarely travelling out of the city environment to meeting people their own age who go to France for shopping expeditions and go to Europe and further afield for their holidays. Money is a serious concern and for these students who are often from a background of benefits, a large debt is a frightening concept. There is no parental back up for them. To then drop out of university with a debt and no degree is of serious concern.

> *'Students from poor families who get preferential places at top universities are three times more likely to drop out of their courses than their counterparts who win places by the ordinary route'.*
> (Henry, 2009, p. 1)

Additional help and feedback from the first term onwards would greatly alleviate students' anxiety about their work and provide them with additional moral support.

Method

This study is the result of interviews, discussions and feedback from these 15 students who have attended the software development course prior to attaining places at research led universities. This was a qualitative study in the form of questions to find out reasons for dropping out as a qualitative study allows for empathetic understanding (Jones, 1997). The questions were checked to ensure they had been understood. Here the qualitative study was chosen to yield answers rich in data as students could express themselves freely. In qualitative research, interviews can be face to face or by telephone and both of these methods were used for this study. A quantitative study was not used as it would not allow for detailed answers (Bell, 2005) as students need to be able to fully explain themselves (Cohen et al, 2003).

This was insider research as the researcher was known to the students as their former tutor on the software development course; it was believed that this would enable the student to be more open in their answers. It is acknowledged that researchers have a significant role in interpreting data (Gillham, 2000). As the researcher did not attend their university, it was anticipated that they would find it easier to talk to her in a more open and honest manner than discussing a similar issue with their university lecturer. Semi structured interviews were selected, there was a list of questions as a guide but the *'interviewer is prepared to be flexible in terms of the order which topics are considered …to let the interviewee develop ideas and speak more widely on issues raised by the researcher'* (Denscombe, 2007, p. 176). The research questions were open such as

'Can you tell me about any problems you experienced in your first term at university?'

'What would have helped you to overcome these problems?'

'At what point did you start to feel that you wanted to leave the university?'

Although interviews take time, the aim is also to understand individual perceptions (Denscombe, 2007) and if the researcher needs to learn about people's feelings, experience and emotions (Denscombe, 2007) qualitative methodology is a means to enable this.

Findings

As increasing and widening participation brings in more students from under-represented groups, they may need more support to complete their courses. If there are few other economically disadvantaged students at the university support is even more critical. Economically disadvantaged students often feel alienated at university as it is an unfamiliar culture with very different values; as Mann (2001) has said

they are '*outsiders in a foreign land*'. The more research focused the university the harder it can be for these students to be part of that milieu.

Early support for fresher (first year) students is critical as 75% of students found that attending university was initially very difficult and stated they would have liked to have more support from other students from a similar background. Finding friends was a problem especially others of a similar background which covered their language, music and the availability of food to which they were accustomed. The following interview quotes from the students interviewed are representative of the answers that were given

> '*There was nowhere to buy plantain*'. '*No one liked rap or hip hop they just liked cheesy music.*' '*They all talked posh and proper and with long words*' and they were always talking about '*skiing and what they did in Asia and all these other places I had never heard of*'. '*I just felt on the edge of it when everyone was talking together*'. '*They were all very nice but I was right out of it*'. They all talked about their holidays I don't even go on one, I have never been to Europe.'

Receiving a low mark for the first piece of coursework submitted was demoralising and students felt that extra help with this would have helped their confidence in their academic ability. '*When I got a low pass mark I just felt what's the point? This is not for me I will never be any good*'. '*I just stayed a lot in my room and did not go to lectures I found it very lonely*'. All of the students interviewed had serious concerns about money and the debt that they were incurring. '*I find my student loan frightening and worry about how much it has cost me*'. '*I wake up in a sweat thinking of all that money I owe*'.

Evaluation of Findings and Recommendations

Due to the findings of this study it is proposed that universities introduce an initiatory course for students with vocational qualifications and those on bursaries which would also enable them to form a support network. Many non A level entrants to universities have little experience of exams, as many vocational courses are coursework based. To have the opportunity to take a course providing help with examination techniques, revision techniques and advice on how to succeed in assignments would be a great support to these less advantaged students.

Additional support in the first term is likely to boost disadvantaged students' confidence at a time of anxiety. Becoming accustomed to the type of academic writing and literature referencing and the standard that is expected would be highly beneficial as prior to attending university many non A level students are used to small groups and to receiving a lot of support.

A further finding of this study was a students' desire for a mentor. Some economically disadvantaged students who had enrolled in prestigious universities said they had trouble '*fitting in*' (Forsythe and Furlong, 2003, p. 1). This mentoring should also start in the first week. Second and third year students could be encouraged to be mentors which they could put on their CVs. The mentors would need to be from the same social and preferably ethnic background as the mentored students so that they speak the same 'language'. Initial support from someone who

understands what they are going through is critical to a successful transition from college to university for economically disadvantaged students.

As money is one of disadvantaged students' main concerns, those allocating part time work at the universities could give preference to those students. Although these students may have a bursary this is only a small amount of the total fees paid. There are many other costs such as accommodation, food, stationery and socialising. Those who can barely afford to go out are also less likely to then meet and make friends with other students putting them at a further social disadvantage. Allocating part time work to those who qualify for bursaries would help to lessen these students' financial concerns. Although it is recognised that most students worry about money, these students' parents are in receipt of income support and there is very little money given to their children. '*Better financial help, especially non-repayable bursaries, would enable more of them to complete their degrees'* (Forsythe and Furlong, 2003, p. 1).

However it should be noted that many universities do provide extra classes and in this case, software development students who were weak in maths were offered extra maths classes which they had found very supportive. Forsythe and Furlong (2003) have found that students' unfamiliarity with higher education, as they were the first in the family to go to university, meant that they often got poor advice and often enrolled on unsuitable courses. This was not the case in this study as all the students had taken computer science for two years and in effect had three A levels in computing so had very good knowledge of the computer science/software development degree for which they had enrolled.

Finally, it has been found that all of the students who dropped out of the first university they enrolled in then went to other universities so did not give up on higher education. They all went to universities where there were more students from their background and milieu. They fitted in better there and succeeded in gaining a degree. These universities may not have had the prestige, status and easier access to the graduate job market but the students were happier, made more friends and completed their degree.

Conclusions

Supporting economically disadvantaged students at research led universities is critical if they are to gain their degree. It is recommended that these universities should run introductory courses at the beginning of the academic year aimed at vocational students and those on bursaries, and also introduce a mentor system with that mentor being of the same background and cultural milieu as the student. Additional support during their first term is likely to encourage and help these students. Increased financial support and help with part time work at the university would also be a considerable benefit.

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ATTITUDES OF PARENTS TOWARDS CONTEMPORARY FEMALE HIGHER EDUCATION

Abstract

This paper is derived from the author PhD dissertation (gender issues in higher education of Khyber Pukhtunkhwah (KPK) Pakistan). This study aimed at exploring the attitude of parents towards contemporary women higher education. The population for the study was the students' parents of four colleges of Peshawar, capital city of KPK, although the original study did not included the parents. Twelve Parents (mother and father) of each college were selected randomly as a sample of the study. Thus the sample consisted of 48 individuals. The respondents confessed the domination of the paternalistic culture in KPK society that majority of parents make decisions about their daughters' future life. Although they agreed that Islam highly valued woman higher education therefore parents have to encourage women education in the province.

Keywords: Khyber Pukhtunkhwah, Pakistan; Attitudes; Female Higher Education

Introduction

According to Good (1959) attitude is the predisposition or tendency to re-act specifically towards an object, situation or value, usually accompanied by feelings and emotions. Some writers differentiate a verbal attitude from behavioral attitude; attitude cannot be directly observed but must be inferred from overt behavior, both verbal and non verbal.

Islam gives the right of education to the female gender. The Holy Prophet Muhammad (Peace be upon him) commands that acquiring knowledge is obligatory for every man and woman. Both men and women have to face accountability on the Day of Judgment on equal footing, justice demands that none of them should be deprived of knowledge (Ali, 1997).

The importance of women's role in the process of development was recognized long ago. Women have economic, political and social roles to play. Keeping in view the importance of female education, it is believed that major cause of lagging behind in general, in economic and social progress, in most of the developing countries, including Pakistan is the absence of a higher percentage of educated and technically qualified women (Ahmad, 1994).

It is an economic fallacy to suppose that females are not suitable for economic platform. Women can play an important role in this field and can provide surety for prosperity (Haq, 2003). There can be no doubt that the women of Pakistan are striving to play their part in raising the status of themselves, their families and their nation. Women have already won for themselves an enviable reputation at the highest level of our national life as well as in international circles. We are confident from the spirit which the women of Pakistan have shown in such achievements as those of the All Pakistan Women's Association that they can assume roles of great importance in the consolidation and development of the country if their dynamism

and dedication can be nurtured and their efforts guided into those channels where they can be of the greatest service (GoP, 1959).

Pakistan is a developing country. It is quite clear that without imparting education to the female, progress of the society will be very difficult. Khyber Pukhtunkhwah Province includes tribal areas of Khyber Agency, Malakand Agency, Mohmand Agency, Kurram Agency, Orakzai Agency, North Waziristan and South Waziristan Agency. Almost 90% of the females with secondary education have very limited access to higher education. There are social, economic, geographic, and tribal Pukhtun culture, war against terrorism and other reasons for their limited access to higher education. However, importance of female education is never denied in the history. Therefore it seems appropriate to study the attitude of parents towards contemporary female education.

In the light of the above discussion the study main objective is to explore the attitude of parents in different economic strata (upper, middle, lower middle and working classes) parents towards contemporary female higher education of KPK society. The researcher is very positive about the implication of this research that more parents will be encouraged to send their daughters to higher education in KPK society.

Population and Sample

This small scale research study comprised four different economic class of Peshawar City of KPK (Pakistan). Random sampling technique was used to select the sample from each of the following strata: upper class, higher middle, lower middle, and working class. 12 individuals (mother and father) from each class were selected randomly. During the course of the research, the law and order situation in the country, particularly in KPK, did not allow the researcher to access more than four colleges, secondly the researcher rely on those respondents who could easily accessed. Thus the total number of respondents was 48.

Instrumentation

For the collection of data a questionnaire containing 25 items was developed using five-point Likert scale for parents, both mother and father. Questions were translated into Urdu and Pukhtu languages for the convenience of the respondents.

Data Collection

The researcher collected data through personal visits to these four colleges. It was observed that their attitude towards the research was very cooperative. The questionnaire was distributed to the students (as they have been selected in 2008, for the author's PhD sampling for more details see Khattak, 2009). The questionnaires were taken by the students to their home, filled and returned to the researcher on their next visit after a week. In order to get the required information the researcher had a glance over the questionnaire after receiving it back from the respondent. In the light of information received through the questionnaires, results have been drawn.

Analysis of Data

Data collected through above mentioned instruments was tabulated, analyzed and interpreted category wise as mothers and fathers. The data chi square was not used due to the small sample size. On the basis of the analysis and interpretation of data, conclusions were drawn and recommendations were made. (All tables available upon request from author)

Discussion

Education is essential for every member of the society. The process of education is from cradle to grave. The secret of survival of nations lies in education. The nation which lags behind in the field of education dies soon. Pakistan as a developing country has a dire need for educating the individuals irrespective of the economic and gender differences for rapid progress. At this time, Pakistan is passing through a very critical situation due to extremism and terrorism and the western world blames Pakistan, especially KPK, for extremism on the basis of religious extremism. As far as Islam is concerned, it does not forbid seeking knowledge rather it obligates upon learning on every men and women. Islam invites the people to ponder and concentrate on the creation of the universe. It develops the attitude of its followers to come forward for enhancement of knowledge.

The ultimate aim of the study was to examine the attitude of parents in different economic class towards contemporary female higher education in KPK. The religious class always leads the nation according to the teachings of Islam but it has been blamed for negative attitude towards contemporary female higher education.

The results of the study revealed that higher education is the right of women. Because women form 52% of our society, closing the doors of higher education to the female gender results in the deterioration of the nation as well as the country.

The majority of the parents of different class were of the opinion that females can play a vital role in the society as well as in the development of the country by getting higher education according to the norms and values of Islamic society, The main objective of higher education is the social and economic growth of the society and the female higher education helps a lot in this connection. Haq (2003) supported this idea by saying that the major cause of lagging behind in economic and social progress is the absence of educated and technically qualified women.

The study results found that educated women perform their duties better than other women of the society. As the educated women have lot of options before them and it is very easy for them to find a desirable solution of a problem Malik and Courtney (2011) supported this idea which states that higher education empowers women to exercise their rights and responsibilities as a citizen of the society and enables them to make efficient choices.

Majority in the parents were of the opinion that highly educated women behave fairly well with her husband and with other members of the family and the higher education based on Islamic ideology imparts and preserves the moral and social values of the Islamic society to the students. During the most important period of infancy and childhood of a person, the female is considered responsible for the intellectual, emotional, social, physical and character development in the families of Muslim society. Saleem (1990) supported this by stating that all…Telling about the

training of the children the Holy Prophet (Peace be upon Him) says that every child is born in original purity; it is his parents who make him a Jew, Christian, or an idol worshipper – quote from Bukhari: a compilation book of *Hadiths* (saying of prophet Muhammad Peace be upon him). Rao (2000) also supports this idea by saying that the spread of education made women aware of their role in society and the impact of higher education made them realize the importance of improving their rights, privilege and status.

The study results found that the establishment of women universities would play a vital role in women higher education because Islamic and the traditional Pukhtun culture do not permit co-education at any level, especially, at higher level and in Pakistan, establishing of separate government schools and colleges for female students under separate female administrative authorities is of great importance. Iqbal (1997) supported this idea and noted that Pakistan had inherited one university in 1947, and, in order to provide qualified manpower a large number of colleges, universities and professional institutes were opened. Siddiqui (2004) also supported this idea by viewing that Fatima Jinnah and Frontier women universities were established on the demand of parents who preferred to educate their daughters in female institutions. Siddiqui (2004) further supported the view that female universities in Indian subcontinent had helped increase female enrolment in higher education because most of the Muslims are not in favour of co-education system at any level.

The majority of the respondents viewed that highly educated girl is vitally important for grooming and upbringing of children. As the major role of education is the transfer of cultural heritage to the next generation and a highly educated girl can transfer the Islamic values to the next generation very sensibly. Akhter (1996) supports this idea by saying that in the Muslim families rearing of children and their character building is the responsibility of women, so it is necessary for a woman to be educated. If the mother is bearing good thoughts and good traits, she may transfer them to her kids. The lap of mother is the first institution of the child. If she is away from ignorance and equipped with knowledge, the coming generation will get good training from this institution and in the future this generation will produce good Muslims. Khanna (2005) further supported this idea and views that women should be given the opportunity to receive education in order to transmit this knowledge to future generations.

The study reveals that most of the people want to educate the female gender up to a higher level without any class difference for the betterment of society. Virk (2003) supported this idea by viewing that women and students from lower income groups have much less participation in higher education which is against the principle of equity and this demands expansion of the base for higher education to give equal access to all the groups of society. The study results show that female education helps in increasing family income while taking into consideration the Islamic values and boundaries. World Action Plan (1990) supports this idea by stating that female education has a positive effect on family income.

The study reveals that higher education is not the source of all social evils if it is based on Islamic principles. Moreover it develops character of women. However, sometimes, the environment of higher education institution promotes a negative role to make the women of Muslim society a show piece. Maududi (1995) supports this

idea by stating that Islam permits women to gain all sorts of knowledge, which build their character provided they do not exceed the limits, which are prescribed for them in Islam.

The study shows that educated females always abide by the social values because a highly educated woman can understand well the social norms and she can go deeper to understand what has been described as social value. Veer (2004) supports this idea by saying that the education of girls means alteration of gender roles and to understand exercise all human rights.

Limitations of the Study

The study had its flaws as well. The responses might be invalid and unreliable because the age difference of the respondents may influence their views. The responses might be unreliable as with the passage of time the views of the respondents may change. The results were drawn and findings were made by using data spreadsheet. There are other methods of collecting and analyzing the data as well but Likert scale was used only. The researchers selected only urban sample small sample therefore sample size and urban parents could be a limitation of this study. Keeping in view the real world constraints, the study was limited only to one district; however, it was necessary to investigate the subject on a limited scale since there was no previous study on parents' attitude to their daughters' higher education.

Conclusions

The following conclusions were drawn from the findings of the study:

- The respondents viewed that higher education is the right of women and it is helpful in developing their personality and administrative capabilities and they can easily find the solution of the problem by differentiating between right and wrong along with the skillful hand in domestic jobs.

- A highly educated girl is more social and obedient to her parents and her husband due to the understanding of worldly affairs and those social values, which are part and parcel of higher education. Most of the respondents viewed that the highly educated girl is more intelligent and develops mutual understanding with her husband and other members of the family effectively.

- Most of the respondents viewed that it is necessary to impart higher education to females without any class difference because the highly educated girl of low income family is a big support in eradication of poverty of that family by using her faculties. The results showed that keeping girls away from higher education is injustice and the whole family would be lagging behind and the consequence is less ratio of development of the society as well as country, for both male and female are part of the same society and society develops more with the education of the both.

- Separate institutes for female higher education were helpful in enhancing the number of female students for higher studies as most of the parents were against the current co-education system due to their adherence with the

culture but the sample were misunderstanding religious and culture discourses.

- Higher education is considered as a precious thing and parents could include it as a dowry for their daughters and it is good to equip them with higher education in the current difficult situation for safe future of their children and society. They viewed that highly educated girl maintains her respect in society by paying equal attention to the responsibilities of upbringing of children along with the jobs for economic development of the family as well as the country.

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STRUCTURED PEER MENTORING: ENHANCING LIFELONG LEARNING IN PAKISTANI UNIVERSITIES

Abstract

Higher Education in developing countries is frequently restricted to students from privileged backgrounds, especially those from private secondary education. In Pakistan, access to Higher Education, while competitive, is more broadly based, with state universities particularly recruiting students from diverse backgrounds. Just as Widening Participation students in the UK face a challenge in adapting to the learning culture of universities, students in Pakistan face difficulties in taking the opportunities that university presents. In particular, the benefits of wider access and new ideas of peer-assisted learning are inhibited by a formal, hierarchical and teacher-centred university culture.

With the primary aim of introducing peer mentoring as a support service for students in Pakistani universities, a social action research project has been undertaken to explore the impact of students' peer mentoring on the culture of learning, to see if students involved in mentoring effectively transform the learning culture of the institution and promote skills for lifelong learning. The possibility is raised that such schemes, introduced widely, could provide a lever for social change in Pakistan.

A framework of structured peer mentoring was designed as a 'light touch support mechanism' for students in two universities, and evaluated to measure the impact on students' learning and experience. Feedback showed beneficial impact in improved results, progression and retention and in improved peer support across diverse groups within the university.

Introduction

The concept of one person helping another to develop their education or other aspirations has a long history (Roberts, 1999). Homer gave the name Mentor to a close friend of Ulysses who was entrusted with the care and guidance of Ulysses's son, Telemachus, during the 10 years of the Trojan War around 1200 BC (Fagles, 1996). When Telemachus set off to search for his father, the goddess Athena assumed the form of Mentor and 'mentored' him during the long voyage.

Mentoring has been established in many universities in the UK, USA and some other countries, primarily as a means of tackling underachievement and student retention (Phillips, 2009). Peer mentoring in this context is a strategy whereby more experienced senior students (mentors) help and advise their junior peers (mentees) with academic, career or personal development, sometimes under the guidance of a staff member (Miller, 2005). To be effective, mentors need to be clear about the purpose of their involvement with a particular student and to have received some training and an explicit agreement about nature and goals of the mentoring programme (Jacobi, 1991).

This paper presents a social action research project designed to explore the impact of students' peer mentoring on the culture of learning within universities in

Pakistan. As a former teacher and student from Pakistan, I was familiar with the context of research and of the problems students encounter in the Pakistani education system. This research explores the possibility of alleviating some of the student related problems in higher education in Pakistan through the introduction of peer mentoring.

Pakistan has an important strategic place in the world today, geographically and politically. The Pakistan government is committed to the belief that the role of education institutions is pivotal in the economic, political, social and cultural development of the country (Iqbal, 2011), although Pakistan remains a country with very low literacy rates, especially amongst girls in rural areas, and with a higher education participation rate of around 5% (*ibid*.). The level of participation in any form of education in Pakistan is well below international norms (UNICEF, 2011). Since 2001, the Higher Education sector in Pakistan has undergone a renaissance. Currently Pakistan has a total of 135 universities or degree awarding institutions, of which 74 are public/state run and 61 are private. In 1947 when Pakistan gained independence from Indian subcontinent, there were only two universities in the country (Higher Education Commission, Pakistan, 2011).

In Pakistan, universities do not offer mentoring to students and the concept of peer-mentoring is wholly new to students and to many staff. The presence of the extended family is supposed to take care of any support for students outside the standard provision of teaching. However, students' needs are changing. The modernisation and expansion of higher education, new learning and teaching strategies and social changes all impact on the student experience. These changes indicate that traditional support networks are inadequate to deal with the range of issues that might affect students and suggest the need for enhancing student support within the university. Furthermore, the expansion of higher education and the concentration of universities in major cities reflect that students are more isolated from background support – in one of the universities studied, 20% of the students were living on campus, in most cases a long distance from home and family.

Methodology

My approach to the project can be summarized as five steps to planned problem-solving change (Havelock, 1973); the need for change, defining the problem, searching for promising solutions, implementation of the solution and determining whether the problem is resolved satisfactorily. The essence of action research is to monitor change in relation to the planned implementation of a specific practice. In an educational context, an action introduced in this way may yield improvement or information about teaching and learning (Cars and Kemmis, 1986). Action research provides a framework for thinking systematically about what happens in social situations, implementing action for change, monitoring and evaluating the effects of the action with a view to continuing the development. By using this framework, action researchers for a small scale project can not only improve what they do, but also their understanding of what they do (Kemmis and McTaggart, 1982).

Miller (2005) describes peer mentoring as when people of similar age take on the role of mentor and mentee. He points out that 'a majority of programmes of this sort have been peer tutoring where the emphasis is often upon learning support in

the areas of basic skills or subject learning' (*ibid*., p. 120). Peer tutoring involves educational support through meetings between advanced learners and less advanced learners (Saunders and Gibson, 1998). Herrmann (in Breen et al., 2001) suggests that, as societies become more and more complex and impersonal, the need for person-to-person mentoring is becoming more important. He claims that mentoring can bring about a culture of continuous learning that is open to differences, more creative and able to deal positively with change. These points emphasise on the need for Pakistani students to gain support from mentoring arrangements in helping them deal with some issues.

The introduction of the mentoring scheme provided a structured peer support system for first year students and the potential benefits to both mentors and mentees were monitored and measured. The hypothesis was that there would be recordable benefits to both students as individuals in terms of improving their personal and key skills, as well as to the university in terms of improved performance and retention. In addition, consideration was given to the idea that, if the students were introduced to community learning services within the university, they would make a positive contribution towards the wider culture. The students of today will become the decision makers and opinion leaders of the country, especially in a country where university education is limited to 5% of the population.

The action research framework had helped me, in an earlier study of mentoring in secondary schools in Pakistan (see Rachel, 2007), to develop an understanding of concepts of mentoring and peer support as they might be applied in the Pakistani educational context. The current project was collaborative action research whereby the position of the researcher is that of an outsider working with insiders who contribute to change in the organization (Anderson and Herr, 1999; Bradbury and Reason, 2001). This tradition of action research measures change, organizational learning and community empowerment (Freire, 1970). A key contribution that action research makes is in helping communities to perceive development not as a destination characterized by material conditions, but rather as a process of learning that results in social and economic advances (Nemeroff, 2008).

The fieldwork was carried out in one state and one private university in Lahore. These were selected to sample groups of students from contrasting backgrounds. While the private university had mainly middle class students, most of whom had studied in private English language schools, the large state university recruited widely across Pakistani society, and the majority of students came from Urdu speaking schools. In each university, a group of senior students were selected to participate in training workshops to prepare to be peer mentors. Also in each university, a group of new students was selected to form the sample of mentees. Selection of the mentees was made on the basis of representative student cohorts, with the assistance of university academic staff. Care was taken to ensure comparable representation in terms of gender, age and relevant variables. To achieve this spread of representation, students were selected from two contrasting departments at the state university, one of which had highly competitive entry, and had very able students and the other was much less competitive.

In university 1 (U1), a total of 60 mentors and 105 mentees were selected for the two participating departments: Department of Education and Research and the Department of Biochemistry and Biotechnology. In university 2 (U2) a total of 20

mentors and 40 mentees were selected. Male mentors were assigned male mentees and female mentors were matched with female mentees to minimise problems that could arise due to gender-related issues.

The project was monitored and evaluated throughout the year and feedback was received by all participants of the project. Focus groups of mentors and individual interviews with at least 5 mentors and mentees from each group at U1 and U2 were also conducted to ensure validity and reliability of the data (Cohen, *et al.* 2011).

Results

The interim and final reviews and feedback from students (mentors and mentees) confirmed the benefits of peer mentoring.

Some comments from the mentees from U1 were:

> 'it was due to my mentor that I got good grades in my January assessments', 'I feel confident in talking to my tutors because of the encouragement from my mentor', 'I know the university credit and semester system better now', 'it is a good feeling to know I can talk to a friendly person on campus once a week, to discuss my problems or just to reflect on my studies, my assignments and classes – this has helped me to become more organised' and 'I am thankful to you for providing us help in the form of mentors as I was very shy and hesitant to go to tutors with minor issues because this is the first time I have studied in a co-educational institution and I don't live local'.

One mentee from U2 said:

> when I was informed about this facility at the university, I was not sure whether a fellow student could help me, but after my first meeting with my mentor I felt that this could be very helpful because I felt comfortable and my mentor was very supportive and encouraging. I discussed my problems regarding my tuition fee issue with my mentor and was encouraged to speak to the dean of students regarding my issue. I did exactly that - my issue was resolved and I found out that due to my financial situation I had qualified for a scholarship that could cover my tuition fee. I am ever so thankful for the advice and support of my mentor otherwise I think I would not have been able to continue to study at such a prestigious university (mentee, U2).

The mentors' feedback from both universities on the progress of their mentoring meetings were: 'it feels good to be valued', 'I am more confident and can explain concepts more clearly as this has helped me clear my own concepts on a few topics I have studied last year', 'my mentee was very shy but extremely talented I just helped her prepare and participate in a fashion show event held at the university'. 'It was fun and I felt I had made a positive difference in someone's life. This is a great feeling!', 'thank you for helping me explore my leadership and communication skills, this will help me throughout my life. I wonder if I had a mentor during my first year I could have adjusted to university life much more quickly as I see that my mentee is settling in with a greater ease than I am. Nevertheless, I am happy that I can be helpful to freshmen in the university'.

The problems the students had encountered were mainly minor issues of time keeping. A small percentage of mentees were not interested as they thought it was a waste of their time to meet every week.

Conclusions and Further Developments

Education for citizenship to promote lifelong learning has become an increasingly important part of the curriculum, and peer mentoring provides one obvious way in which higher education institutions can generate service learning opportunities. As Miller (2005) points out, it is important that research is carried out to investigate the most appropriate peer helping strategies for different kinds of student needs. The experience of this project and examples of good practice that were developed provide a sound basis from which to establish a generic model which can be applied in a variety of peer mentoring settings in the education system in Pakistan. In particular, the research findings imply that students who had mentored or been mentored were more receptive to student centred learning, and also took the ideas of continuing education through peer learning into their careers. In one of the universities, the scheme has been adapted to provide mentoring for all first year students. One student mentor from the other university has taken the model of mentoring and introduced it to career support for in-service teachers. In Pakistan, there is an increased demand for service learning and citizenship opportunities in education to promote peace and harmony (Ministry of Education, 2010). It is hoped that the Ministry of Education in Pakistan will include peer mentoring schemes as part of the policy to provide these opportunities and strengthen education across the whole country.

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THE RISE OF PRIVATE HIGHER EDUCATION IN JAMAICA: NEO-LIBERALISM AT WORK?

Abstract

The rise of private higher education in Jamaica plays a key role in expanding educational access to the masses. The shift towards the neo-liberal perspective has directed the focus of education policy reforms toward emphasizing economic efficiency, diversity in choice, and market mechanisms. The purpose of this qualitative study was to gain insight, from the perspective of high level administrators at four local private higher education institutions in Jamaica, on why private higher education institutions have flourished as key providers of Jamaican higher education, how these institutions facilitate access to higher education, and to what extent private institutions contribute to achieving Jamaica's higher education goals.

The researcher utilized a holistic, multiple-case study design. Methods employed in this study included face-to-face individual interviews, document analysis, and site visits to private higher education institutions in Jamaica. Human capital theory was used as an analytical lens to examine the extent to which the neo-liberal framework is appropriate for understanding how higher education is unfolding in Jamaica. This paper focuses on the general conclusions of the research, which suggest that Jamaican private higher education institutions serve to challenge the status quo by providing access to members of the society who had been marginalized by the public higher education system.

Introduction

Higher education is of vital importance in the economic development of small nation-states, like Jamaica, if they are to become competitive participants within the global marketplace. For many developing countries, the demand for relevant, convenient, cost effective, quality higher education has outstripped the capacity of governments to meet such demands. In Jamaica, higher education has traditionally been socially biased, favoring students from the higher socio-economic groups and elite members of the society (Braitwaite, 1958; Jules, 2010; Williams, 1968). Students from the higher socio-economic groups tend to be better prepared to meet entry requirements and the academic rigor of higher education as they are able to access the necessary fiscal resources and possess the social capital needed to obtain a higher quality of education at the primary and secondary levels (Asplund, Adbelkarim & Skilli, 2008; Ziderman, 2005). A primary challenge for Jamaica is providing opportunities for greater access to higher education for a wider cross-section of students (Howe, 2003).

For most Jamaicans, higher education has historically afforded opportunities for social mobility (Cogan, 1983; Evans, 2001) by providing access to better paying jobs and career opportunities. As Jamaica strives to achieve developed country status by the year 2030, the economic value of higher education is often highlighted and is a key component of national discussions on higher education policy (Holding

& Burke, 2005). Jamaica, through its higher education system, hopes to produce "well rounded and qualified individuals who are able to function as creative and productive individuals in all spheres of society and be competitive in a global context" (PIOJ, 2009a, p. xxvii). In light of the increasing demand for Jamaican higher education, providing greater access to higher education is essential to improving Jamaica's productive capacity and achieving its goals of economic development.

The growing demand for Jamaican higher education

Jamaica's higher education enrollment rates have more than doubled over the past 15 years (Miller, 2005). Throughout the period from 2002 to 2009, there was a relatively steady increase in the total national enrollment in Jamaican higher education. In 2002, total enrollment in Jamaican higher education was 41,761, while total enrollment for the 2008-2009 academic year was 64,034 (PIOJ, 2009b). In the 2009-2010 academic year enrollment was estimated at 68,471 (PIOJ, 2010). As an aggregate the gross higher education enrollment rate continues to increase steadily. By 2010, the total gross enrollment of the tertiary cohort aged 20-24 grew to 32.8% (PIOJ, 2010) up from 18.1% in 2003 (PIOJ, 2009c). In 2003, the total private enrollment at Jamaican higher education institutions was estimated at 6,755, while in 2007 the total estimated private enrollment more than doubled to 17,389 (PIOJ, 2009c). The overall market share for private higher education enrollment in Jamaica jumped to 26.4% in 2007 from 17.1% in 2003 (PIOJ, 2009c).

Private higher education institutions emerge largely in response to existing demand for higher education that the public sector institutions are unable or unwilling to provide (Kisner, 2010; Altbach, 2000). The growth of Jamaica's local private higher education sector is due to the limitations of the public higher education sector and the flexibility with which private institutions have responded to the changes in demand for Jamaican higher education. Fulton (1981) advanced that institutions of higher learning may adapt more readily to the needs of potential and existing students by facilitating opportunities for students to attain greater financial leverage and by expanding the range of qualifications considered in the admissions matriculation process. Some Jamaican private higher education institutions have adopted alternative admissions policies to facilitate greater access for non-traditional and underprepared students. Many of Jamaica's public higher education institutions were reluctant to respond to changes in the local student demographics (Ministry of Education and Youth, 2006). With greater numbers of individuals who are employed full-time seeking higher education, there has been a significant demand for more flexible course offerings that would better accommodate and support these individuals in their academic endeavors. Honig (1996) posited that the growth in the demand for higher education in Jamaica occurred at a much faster rate than the government's capacity to accommodate. The public higher education sector had blatantly overlooked the growing non-traditional segment of the higher education student population and was also reluctant to provide higher education in rural and suburban locations outside of Kingston. Thus, local private higher education providers emerged as principal suppliers of higher education and training for students living in rural Jamaica and those employed full-time within the workforce.

The neo-liberal agenda

The growing acceptance of neo-liberal economic principles among governments around the world has resulted in reductions in nation-states' investments in higher education and has promoted greater competition among national and cross-border higher education providers (Portnoi, Bagley & Rust, 2010). Although the neo-liberal agenda is at work within Jamaica's higher education sector, there is not a wholesale adoption of the neo-liberal philosophy by senior level administrators at local private higher education institutions. The neo-liberal ideology is evidenced by (a) multiple providers of higher education who compete for students; (b) private institutions operating autonomously of government interference; (c) institutions offering programs in response to market demands that the government is unable to meet; (d) students having a greater choice among degree granting programs and academic institutions; and (e) intensified focus on satisfying the student consumer. In addition, private institutions fill specific niche markets, are concerned about the profitability of the programs they offer, and stress the importance of efficient resource allocation.

Jamaican private higher education institutions have done much to construct themselves as different from public universities. Private institutions have distinguished themselves by (a) catering predominantly to part-time students, most of whom are employed full time; (b) establishing academic centers within rural communities; (c) offering flexible course schedules; and (d) providing flexible payment options (e.g., tuition discounts, monthly and pay as you go plans). Private institutions also help to advance the social justice agenda by expanding access to higher education with a view to promote and facilitate greater levels of social equality and upward mobility. Whiteman (2001), a former Minister of Education for Jamaica, asserted that within the Jamaican society it is generally assumed that higher education is "desirable because it offers the best [prospects] of a professional, well-paid job, and earn[s] you respect among the mainstream population" (p. 37). However, the fiscal and infrastructural limitations faced by the Jamaican government have restricted its ability to provide access to higher education for a significant segment of the Jamaican population. Individuals within this underserved segment are further marginalized due to the structure of the public higher education system which privileges those who are able to enroll in traditional full time study, and possess adequate financial resources to attend the public universities within Jamaica's urban center. In an effort to challenge the status quo, the local private higher education institutions cater predominantly to members of this marginalized segment of the Jamaican population.

Higher education in Jamaica is relatively more accessible today due to the presence of private higher education providers and local institutions in particular. Based on private higher education enrollment data available from the PIOJ, the reported student enrollment at private higher education institutions in Jamaica grew from 9,110 in 2002 to approximately 19,427 in 2009. During the eight year period from 2002 to 2009, there were a total of approximately 113, 459 students enrolled at private higher education institutions in Jamaica. Excluded from these enrollment estimates are students enrolled at private higher education institutions that are not registered with the University Council of Jamaica (UCJ).

Opportunities for accessing higher education locally have also improved significantly. Prior to the 1986, the University of the West Indies (UWI) was the

only degree granting higher education institution in Jamaica. Currently there are three local universities, seven teachers colleges, and several private institutions that offer full undergraduate degree programs. Local private higher education institutions have contributed to increasing access to quality higher education for segments of the population that were previously excluded or underserved by offering a wide range of mission-focused educational programs and providing higher education and training that is aligned with workforce needs. By facilitating greater access to higher education, local private higher education institutions play a crucial role in shaping Jamaica's national higher education goals.

Charting the future

As Jamaica strives to become a high-income economy or a developed country, *Vision 2030 Jamaica* (PIOJ, 2009a) has emphasized that increasing the productivity levels of Jamaica's greatest resource, the Jamaican people, is at the core of attaining this goal. It is against this backdrop that higher education is presented as an investment in human capital, a means of achieving economic growth and development, and a source of international competitiveness within the global marketplace. Within a developing middle income economy, like Jamaica, where there is an abundance of "human capital" it seems plausible that expanding access to higher education would serve to "lift production of goods and services up the value chain beyond simple processes and products" (PIOJ, 2009a, p. 58). Not only is it necessary to expand access to higher education by allowing local private higher education institutions to operate as complements to the public institutions within Jamaica, but it is also necessary to ensure that all higher education institutions function within a quality framework that is relevant to the needs of Jamaica and the Caribbean.

Jamaica's local private higher education providers have expanded access to higher education by focusing on the students' need for affordability and flexibility. Thus, Jamaican higher education policymakers and implementers must become more attuned to the range of access challenges faced by students in order to effectively formulate national and institutional policies that facilitate a variety of feasible alternatives for students. Clearly articulated higher education goals within an effective quality framework are essential to ensure that higher education institutions are indeed able to "impart skill areas that are relevant to existing and emerging jobs or career tracks" and meet the needs of the Jamaican society (PIOJ, 2009a, p. 68). Grant-Woodham (2007) asserted, "higher education contributes to labor productivity, entrepreneurial energy, and quality of life; enhances social mobility; strengthens society; and promotes democratic governance" (p. 134). This supports the notion that Jamaican higher education can serve as a tool for economic development and simultaneously facilitate greater levels of social equity and mobility, as these goals are not mutually exclusive.

The fact that the neo-liberal principles are evident within the Jamaican higher education system does not imply that the social benefits of higher education are secondary goals for local private higher education institutions. Local private higher education institutions continue to contribute to the expansion of access to Jamaican higher education. These institutions have etched out a niche within the Jamaican higher education sector by focusing on creating new ways of making higher

education more accessible and affordable. As Jamaica moves forward, it is likely that local private higher education institutions will play an increasing role within the Jamaican higher education landscape as they continue to challenge the status quo and expand the range of higher education options available to both non-traditional and traditional aged students.

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EDUCATIONAL DEVELOPMENTS IN THE BRITISH WEST INDIES:
A HISTORICAL OVERVIEW

Abstract

Formal education within the English-speaking Caribbean Community (CARICOM) may be traced back to the establishment of Codrington grammar school in Barbados in 1743. After more than two centuries of British colonial rule the educational systems within CARICOM states continue to reflect the academic traditions of their former colonizer. Prior to emancipation in 1838, the notion of providing education for the African slaves met strong opposition from plantation owners, despite the efforts of many Christian missionaries seeking to provide religious education to convert enslaved-Africans to Christianity. During the post-emancipation period, the education of ex-slaves within the British West Indies became one the central issues of the day. Religious groups including the Anglicans, Baptists, Catholics, Methodists, Mico Charity, Presbyterians, and Wesleyans, together with financial support from the imperial government and the Negro Education Grant, drove and shaped the development of education at all levels of the British West Indian society. The purpose of this paper is to present a brief historical overview of some key developments in formal education within the English-speaking Caribbean during the period following emancipation.

Introduction

The Anglophone Caribbean Community (CARICOM) consists of a grouping of democratic states located in the Caribbean Sea that have a shared history of over 300 years of British colonization (UNESCO, 2001). CARICOM states are characterized by similarities in heritage, socio-cultural norms and values, as well as political, and educational systems. For example, the education systems throughout the Commonwealth Caribbean are based on the British model of formal education (Peters, 2001). The region is geographically composed of ten independent small island states: Antigua and Barbuda, Bahamas, Barbados, Dominica, Grenada, Jamaica, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, and Trinidad and Tobago; two independent territories located on the main land of South America: Belize and Guyana; and four British dependencies: Anguilla, British Virgin Islands, Cayman Islands, and the Turks and Caicos Islands (Roberts, 2003). Shortly after World War II, the process of decolonization began to take place in the West Indies. Two key factors impacting the decolonization process included insufficient finance on the part of the British Crown following the war, and a growing aspiration for independence among individual states within the Caribbean (Millette, 2004). In August of 1962, the two largest British colonies, Jamaica and Trinidad and Tobago, gained their independence (Cox-Alomar, 2004; CARICOM, 2005). Many of the remaining British colonies gained independence shortly thereafter – during the late 1960s and into the early 1980s (Millette, 2004; CARICOM, 2005).

During the decolonization period the demographic composition of the student population within the British West Indian education system changed rapidly as

many Whites chose to return to Britain. However, the British educational structures continue to be an essential component of many of the educational systems within the region. Within CARICOM, education plays an integral role in regional development. Historically, education has served the region as a catalyst for productive endeavors that support the creation, acquisition, and dissemination of the knowledge and skills necessary to stimulate and drive Caribbean economies (Leo-Rhynie, 2005). At the higher levels, education within the region serves to prepare graduates for taking on leadership roles in government, industry and commerce, research, strategic planning, and problem solving.

Early developments in formal education

The British model of formal education within the Caribbean dates back to the 1834 Emancipation Act, which provided the first opportunity for mass schooling within the region for a population comprised largely of ex-slaves (Hunte, 1976). The Emancipation Act provided for the education of the ex-slaves within the British colonies and was backed by financial support from the Imperial Government and through the Negro Education Grant (Hunte, 1976). The Negro Education Grant was endowed by an inheritance left by Lady Mico in 1690. Lady Mico had willed her wealth to her nephew with the pre-condition that he married one of his cousins. Alternatively, the inheritance would be used for the "redemption of Christians captured and enslaved by Barbery pirates" (Gordon, 1963, p. 23). The nephew in question never married his cousin, and in 1834, Thomas Fowell Buxton and other abolitionists convincingly argued that the Mico inheritance should be used for the purpose of "Negro Education". During the first two years, the Negro Education Grant was issued to religious groups solely for constructing schools. The Imperial Government contributed to paying two-thirds of the building cost while the religious groups contributed one-third. During the time of the Negro Education Grant, the Mico Charity had provided more educational funding than any other religious group, and had opened four Normal Schools for the training of native teachers.

Prior to emancipation, opportunities for the education of African slaves within the British West Indies were practically non-existent; and where they did exist, were met with harsh opposition from plantation and slave owners (Gordon, 1963; Phillippo, 1843). The majority of the White population, who could afford it, sent their sons to be educated in England as "there was no equivalent of a good English grammar school education to be had in the West Indies" (Gordon, 1963, p. 15). For less wealthy Whites, the demand for a grammar school education was met in part by planters and merchants, primarily in Jamaica and Barbados, who endowed local schools on these islands (Gordon, 1963). The most noteworthy donor was Christopher Codrington of Barbados, who bequeathed his estate to provide fiscal support for the Codrington grammar school for boys in Barbados. The school was founded in 1743 and opened in 1745 (Braithewaite, 1958).

At the start of the nineteenth century, the British Government provided new subsidies for West Indian education as part of a system of imperial grants. Following emancipation in 1838, there were rapid increases in educational enrollment. There was also an increase in the number of elementary, and subsequently, secondary schools (Gordon, 1963; Bacchus, 1994). For example, prior to 1823 there were fewer than three schools in Jamaica that were dedicated solely to

educating the Black population (Phillippo, 1843). By 1841, there were approximately 186 day schools, 100 Sabbath schools, and 25 evening schools (for the instruction of adults) being operated by the Baptists, National Church, Wesleyans, Mico Charity, London Missionary Society, Moravians, and Presbyterians (Phillippo, 1843). Between 1836 and 1858 approximately 278 teachers were trained at Mico normal schools (Bacchus, 1994). There was a significant shortage of trained teachers to meet the growing demands for education, which significantly impeded the quality of education provided. In an attempt to improve the educational quality within the West Indies, in 1867 the Commissioners of Education implemented regulations, which mandated that individuals must obtain a professional certificate of competency in order to be appointed as a schoolteacher.

The demand for classical secondary and higher education during and after the mid-1800s was bolstered by economic decline due to weakened sugar revenues, growth of the local middle class, and the increased availability of lower level white-collar jobs to non-Whites (Bacchus, 1994). During the latter half of the nineteenth century, a vast number of secondary schools were established across the British West Indies. These newly emerged secondary schools included the Antigua Girl's High School founded in Antigua in 1886; St. George's High School and St. Joseph's Convent established in Grenada in 1872; Saffron School founded in 1878, the Kingston High School for boys and Trinity High School for girls established 1895 in British Guiana; York Castle High School established in the 1870s, and Jamaica High School founded in 1882 in Jamaica; and Catholic College of St. Mary's established in Trinidad in 1863. As secondary school enrollment increased several proposals were discussed regarding the need for creating tertiary education opportunities within the region. At the core of these debates was the issue of whether there was a pressing need to establish a university in the West Indies.

The Beginnings of Caribbean Higher Education

In 1830, the Codrington grammar school became a theological college for the training of Anglican priests and was renamed Codrington College. The college was the first higher education institution in the Commonwealth Caribbean (Braithwaite, 1958; Gordon, 1963). Between 1830 and 1950, when the transition to independence began, there were no more than ten small colleges training teachers, five even smaller colleges training ministers of religion, a few for the preparation of nurses, and one college training agriculturalists in the entire British West Indies (Miller, 2000). Some of the major landmark institutions that emerged to meet the demand for and to facilitate the development of higher education within the region included Calabar, a Baptist theological college, established in Jamaica in 1843; the Imperial College of Tropical Agriculture (ICTA) established by the colonial authorities in Trinidad in 1921 (Roberts, 2003); and the University College of the West Indies (UCWI), currently the University of the West Indies (UWI), established in Jamaica in 1948 as a regional institution with a mission to meet the higher education needs of the Anglophone-Caribbean and to promote regional identity (Cobley, 2000). At the time the UCWI was founded, the chief purpose of higher education within the British Caribbean region was "to cultivate skills, dispositions and social identities consistent with the imperatives of [a] nationalistic ethic" (Sylvester, 2008, p. 273). UWI currently has three regional campuses that are located in Jamaica, Barbados,

and Trinidad and Tobago, University Centers in the non-campus countries (NCCs), and a Center for Hotel and Tourism Management in the Bahamas (UWI, 2006).

Beginning in the late 1960s through the 1990s, there was a rise in the number of higher education institutions in response to the growing demands for higher education within the region. In the 1980s and 90s increased demand for higher education resulting from pressure for access by larger numbers and more diverse groups of students resulted in the emergence of new universities, multi-disciplinary colleges as well as specialized non-university tertiary institutions (Roberts, 2003). During the late 1960s through the 1990s, there was a rise in the number of higher education institutions within the Caribbean in response to the growing demands for higher education within the region (Miller, 2000). At the dawn of the twenty-first century, increased demand for higher education within the Caribbean was being met by the emergence of new universities, multi-disciplinary colleges as well as specialized non-university tertiary institutions (Roberts, 2003). At present higher education within the Anglophone Caribbean consists of a diverse mix of over 150 higher education institutions, approximately 60% of which are publicly or nationally funded; 30% are completely private; and 10% are privately owned but receive some government funding (Howe, 2003).

Conclusion

The British academic traditions are still an integral part of the education systems within the English-speaking Caribbean (Peters, 2001). Hunte (1976) contended that the British academic traditions had resulted in the creation of "a higher education system in the West Indies that was highly competitive, selective, and largely unresponsive to the needs of the area" (pp. 189-192). There is a strong belief among CARICOM states that education, and particularly, higher education provides the capacity to move beyond cognitive and intellectual development by utilizing the teaching and learning environment and the academic experience to enhance the autonomy, maturity, and character of the individual in a holistic manner (Nettleford, 2002). CARICOM's ongoing imperative to expand educational access at all levels is a proactive response to "anticipated demand for local leaders, professionals and technocrats in the newly emerging nation states and semi-autonomous dependencies" (Miller, 2000, p. 123).

As CARICOM governments continue to chart national goals of social and economic development, careful attention must be placed on improving educational quality and ensuring that education policies support the development of robust education systems that are equipped to meet the changing needs of the region. Jules (2010) cautioned that CARICOM education reforms often prove problematic to implement, as reform agendas are often inconsistent and are likely to change when local governments change. Regional governments must, therefore, take into consideration the needs of CARICOM as a whole in their prediction of national education requirements and in the formulation of local education policies.

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FOCUS LEARNING SUPPORT: RISING TO EDUCATIONAL CHALLENGES

Introduction

This paper discusses the operations of Focus Learning Support (FLS), an organisation that provides educational support for overseas students, in particularly, Nigerians who are desirous of pursuing academic courses at universities and colleges in the United Kingdom (UK). In highlighting the vital role that education plays in the national development of Nigeria, the paper looks at the main educational activities that took place from 1960 to present. It explains how globalisation and its related processes, together with the rapid advancement in technologies, have impacted on national development and general education progress. National economic development, social development in relation to aspirations, resources and equipment, the rising emphasis of Information Communication Technology (ICT) in the classroom and 'migration for education' trends are identified as the major challenges that young people face. The paper shows FLS as the mechanism for effectively addressing the challenges overseas students face. It strongly asserts that the delivery of constructive, educational activities in a safe and user-friendly environment will not only motivate students to positive action, but will also assist them to make sound educational progress. This, it argues, should be done in collaboration with various community groups and organisations. To date, the progress that FLS has made via its seminars and training and development programmes has been shown to be productive. The paper utilises a number of case studies to support this claim.

The Context

Three related educational situations provide the context for this paper – the effects of corruption on education from a Nigerian perspective, the UK experience and FLS' agenda. The authors see these contexts as useful because they give the reader a deeper understanding of what FLS represents.

A Nigerian Perspective: It is not unusual to hear 'Nigeria' and 'corruption' mentioned in the same sentence. Stories of scam, deception and fraudulent practices are well documented (Smith, 2010; Osaba, 2007). Evidently, any sort of corruption will impact negatively on the education system. In commenting on how the corrosive effect of corruption affects education, Torulagha (undated) hypothesises:

- There is a relationship between corruption and lack of infrastructural development, modernization and rehabilitation of Nigerian educational institutions.
- There is a relationship between corruption and lack of concern for student services.
- There is a relationship between corruption and the poor state of academic standards.

- There is a relationship between corruption and the increasing lack of professionalism and ethical standards by administrators and teachers/ instructors/lecturers/professors in secondary schools and institutions of higher education.

Torulagha concludes that the high standard of education that Nigeria experienced from the 1960s to the 1980s decade had declined and "the most likely factor contributing to the retrogressive trend in education, at all levels, is corruption". This does not mean however that generally, education is not valued and has been placed 'on the back burner'. Education is still viewed as the key to success and national development.

The rapid growth and expansion of education programmes and activities in Nigeria since its independence in 1960, demonstrate the value that the country has placed on education. This is not just a pastime for political leaders who are trying to attract voters. It is a genuine desire of most, if not all members of the Nigerian community to acquire the knowledge and skills that are necessary for nation building. It is generally accepted that education plays a very significant role in the social and economic development of the country. It is also the tool that can keep the country in step with what is happening around the world, and can help it to develop regional and international partnerships that are able to benefit the overall growth of the country.

Fifty one years after independence, the need for a sound education has not decreased. In fact, it is reasonable to assert that the need is much greater for approximately twenty years into independence, research reports were showing that in spite of the economic progress made as a result of the oil industry, there was a general sense of dissatisfaction with the progress made in education and other sectors (Brownsberger, 1983; Joseph, 1983). The need to bring education standards in line with commendable international standards was dire. The government of Nigeria recently initiated higher education policy reforms intended to bring its university system more in line with international good practices. The reforms promote increased institutional autonomy, greater system differentiation, strengthened governance, and mechanisms for quality assurance. They seek to create a more flexible and responsive system of university teaching and research that, over time, will contribute increasingly to national innovation capacities, productivity gains, and economic growth.

Given that the above policy reform will make a valuable contribution to national development, it seems practical for all Nigerian students to avail themselves of situations that provide opportunities that will help them to increase knowledge and improve skills and capabilities. National and overseas-based educational institutions and organisations such as FLS are therefore crucial in helping Nigerian students to achieve their fullest potential.

The UK Experience: Over the decades, students from around the globe have been coming to the UK to study in colleges and universities. According to Universities & Colleges Admissions Service (UCAS), the organisation responsible for managing applications to almost all full-time undergraduate degree programmes at UK universities and colleges, in 2011, of the 1.8 million full-time undergraduate students in Higher Education (HE), over 104 000 of them are international students (UCAS, 2012). Evans (2011) reports that "UK universities educate about 2.5 million

students annually, with a 28% increase in student numbers overall in the past 10 years". These data suggest that studying in the UK is a popular choice for international students.

It is generally acknowledged by educators and researchers that the wide range of courses offered, the practical experiences gained, the new skills learned, the opportunity to study in a multi-ethnic and multi-cultural setting and pursuing courses of study in English, an international language, are some of the factors that attract overseas students to UK universities and colleges. Besides, English is often referred to as 'the language of business', and if business is to drive economic growth, then it is vital for overseas students to have 'English' qualifications.

Additionally, the UK's quality assurance practices in HE ensure that students are exposed to the most efficient teaching learning environment possible. The Quality Assurance Agency for Higher Education (QAA), an independent body, is responsible for safeguarding standards and improving the quality of HE in the UK. For 2011 – 2014, QAA aims to:

- meet students' needs and be valued by them;
- safeguard standards in an increasingly diverse UK and international context;
- drive improvements in UK higher education; and
- improve public understanding of higher education standards and quality (QAA, 2012).

The reason for mentioning the above strategic aims is to highlight what guides quality assurance standards in HE in the UK, rather than to debate the impact of the standards. It is these very same guidelines that guide the operations of higher education activities that FLS promote.

FLS' Agenda: Taking into consideration the 'Nigerian perspective' and the 'UK experience' noted above, FLS purposes to assist Nigerian students to gain 'the UK experience' that would allow them to make meaningful contributions to their homeland, and thus support the government's national development programmes.

Mission Statement:

Focus Learning Support (FLS) purposes to educate and empower students, families and interested persons by bridging the educational gaps that prevent them from realising their fullest potential. FLS emphasises that educational development is a lifelong learning venture that merits continuous support from various societal organisation and institutions. To this end, FLS, with assistance from community alliances, embarks on a variety of teaching and learning activities to help it to fulfil its aims.

Core Objectives:

- Encourage learners to pursue educational goals.
- Provide all students with the guidance they need to pursue specific courses of study.
- Incorporate current educational philosophies and initiatives into all learning programmes.
- Revise content, objectives and resources if necessary, to keep in line with educational trends.
- Build on what students have already achieved.
- Imitate good practice.
- Strive to maintain a quality 'culture'.

- Establish learner-friendly environments.
Main Activities:
- Recruitment of international students
- Saturday School
- Educational TV Programmes
- Panel discussions
- Tutorials and supervision
- Seminars and conferences

FLS operates within the framework of the above objectives and activities. It recognises that it is impossible to be efficient and productive without assistance from members of the Nigeria community in the UK, support from concerned members of the UK society and community organisations from both communities. FLS is therefore making 'selected' individuals and community groups and organisation an integral part of its activities. In this way it places itself in a better position to contribute to the regaining of high educational standards in Nigeria and eventually to national development that will give the nation political, economic and socio-cultural significance in a competitive world.

Past Educational Activities

This section highlights how education was valued in the three decades after the independence. Some of the activities that were directly responsible for the high academic standards that Nigeria experienced from the 1960s to the 1980s are shown below:

- Regular federal and state government scholarships for home and overseas studies.
- Easy school access from north to south and vice versa.
- Organised extra-curricular activities.
- Healthy peer-group 'academic competitions'.
- A clear commitment from school administrators and teachers/instructors/ professors to students' academic success and overall development.
- Intercollegiate sports were well-funded (Torulagha, undated).

As noted earlier, the corruption with which Nigeria has come to be associated has a corrosive effect on education. While FLS cannot eliminate the corruption, it is committed to contributing to the raising of the current levels of educational standards that reflect the high levels that the country experienced in the 1960s, 1970s and 1980s, by employing up-to-date educational trends.

Globalisation, Technology and Education

It is difficult to discuss globalisation without mentioning communication technologies. Jeffery (2002) asserts that it is modern communications that makes globalisation possible. Rycroft (2002) sees technology and globalisation as feeding off each other and Iyer, Rambaldi and Tang (2006, p. 21) inform that the area of Information and Communications Technology (ICT) is one the major technological advances under the influence of globalisation processes. Advantages and disadvantages aside, these perspectives suggest that the processes of globalisation

are capable of influencing most of man's activities, including education. This is a two-way connection because the enlightening nature of education also suggests that it does affect globalisation processes. For example, a look at migratory movements reveal that a "significant amount of students from developing countries seek education abroad". In terms of trade, "education services are increasingly traded" between developed and developing countries (Velde, 2005, p. 8).

Given that education is at the heart of nation building, a focus on improving a country's overall standards via globalisation processes seems justified. Evidently, education is the key to profitable trade practices and economic growth; and this means a clear communication of purposes between countries and/or trading partners. However, this is only made possible via an educated and professional workforce, hence the need to educate students to the standards that effect change and promote growth. This recognition is central to FLS operations. In giving a focussed attention to helping Nigerian students to gain knowledge and skills, especially ICT related, can go a long way in narrowing the gaps in educational opportunities that can affect change.

Challenges Students Face and FLS Response

The recruited students face numerous challenges – political, economic and social, ranging from mild to severe. Some of them are identified below:

- ICT skills
- Financial barriers
- Institutional issues
- Culture shock
- Integration into a new academic environment
- Racial discrimination
- Personal problems
- Family issues

In every instance where students report pockets of problems, FLS has responded positively in dealing with individual cases. For example, with regards to funding and other financial issues, FLS has approached sponsors directly on students' behalf. Another example comes from the area of ICT. FLS has collaborated with colleges and universities to give additional support to students to improve students' ICT skills. Similar support is given in FLS' Saturday School.

What Students Say: Some Case Studies

From data collected over time, three examples are cited to demonstrate how students' have responded to the assistance received from FLS.

Case Study 1: Student X

Like every other student that has just arrived from Africa for the first time, I faced many challenges. These challenges were mainly centred on adapting to both social and educational life here in the United Kingdom. This was mainly as a result of the wide difference between the African and the British society… The challenges I faced was very much reduced when I was introduced to the Focus Learning Support Limited. This company was already established in the UK and was noted to have helped Nigerian students to adapt to life in the UK. My meeting FLS was a

dream come true… FLS ensured that I received my allowances from my state Government when due. After I had finished my university foundation programme, they helped to secure admission in the University of East London… I have benefitted immensely from FLS.

Case Study 2: Student Y

I came from Nigeria as a mature student with no ICT skills. I found it rather difficult to cope with my studies because I had to use computers to do my assignments and class presentations. In fact, everything I did revolve around ICT. This made me very unhappy. FLS came to my rescue by giving me extra support at its Saturday School and the European Computer Driving Licence (ECDL) from the University of East London.

Case Study 3: Student Z

FLS has been very helpful to me. When I came to the UK, I got frustrated because I needed financial help and academic advice. I thank God I met a friend who requested I should contact FLS. I then checked online and eventually had contact with Dr. Elizabeth, whom I fondly call "Helper" because of how she salvaged the situation. Since then I have never failed to contact FLS whenever I face any challenge. I recommend that Nigerian students take my advice and contact FLS for any academic problems or to get other advice that they may require.

Implications for FLS

The rapid rise in technological advancement, together with the changes in educational systems and those brought about by globalisation, are likely to have implications for FLS. The operations of FLS are cost intensive, and to be effective, it is necessary for FLS to ensure that mechanisms are in place to run, as well as maintain its undertakings. This means that FLS should 'cut its cloth according to its garments', while focusing on quality assurance. Cost is also an issue for maintenance of premises, resources, equipment, consultancy, wages, 'rewards' and incidentals. In no way should FLS comprise students' success by 'watering down' the knowledge and skills that students need to make them contributing and productive citizens in their homeland.

The twenty first century has brought with it many new paradigms for innovation and the advancement of knowledge with regards to socio-political and socio-economic activities. Many of these are country specific and culture sensitive. It is imperative that FLS retain a Nigerian cultural orientation in deciding which ideas to adapt into its operations, so that it does not lose its focus on national development.

Successive Educational For All (EFA) Monitoring Reports have reported on the high levels of gender disparity in many countries around the world (United Nations Girls' Education Initiative (UNGEI), 2011). Although admitting that there has been considerable improvement in gender disparity in the Nigerian society, Umezulike and Afemikhe (2007), there is still much work to be done in this area. In delivering a vital service, FLS should endure that there is no disparity in its dealings with the students whom it recruited to study in the UK.

Conclusion

A look into what FLS represents and how it is organised as an educational organisation is the main focus of this paper. It relates how FLS provides educational support for Nigerian students who wish to study at colleges and universities in the UK. To put the discussion in context, it looks at three main areas - the effects of corruption on education from a Nigerian perspective, the UK experience and FLS' agenda. The paper acknowledges that during the 1960s to the 1980s decade there were high standards of education in Nigeria, and sees FLS as instrumental in restoring, at the very least, a sizeable degree of those high standards. Working with community organisations and groups, use of the latest innovations in ICT, links to global partners and the impact that both have on education, are seen as channels through which this can be attained.

The recruited students face numerous challenges in the UK. The paper outlines how these are dealt with. Selected case studies demonstrate that FLS has been making a positive impact on some students' educational progress. To continue to make meaningful gains, FLS should consider all costs, avoid gender disparity and retain a Nigerian cultural direction in all its dealings.

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DISTANCE EDUCATION IN HIGHER EDUCATION IN LATVIA

Abstract

For a modern society it is common to have a new point of view about education, which changes functional role of system of education and makes it an integrative social institution. The process of globalization in all spheres of public life makes implementation of the task of continuing education of the population a necessity.

The Education Development Program for 2007 – 2013 period provides for "the introduction of new educational technologies and principles of the educational process to ensure effective implementation of new educational models, lifelong education, including the use of modern information and communication technologies". Innovative educational technologies include distance learning. Modern distance education technologies offer real prospects for improving the quality of knowledge and efficiency of the educational process, to address various social issues related to the functioning of the education system.

Development of distance education requires a special scientific investigation in two keys, interrelated problems of higher education – **social accessibility and quality**.

Introduction

Creating a system of education relevant to the modern image of the world and capable to prepare the population of the planet for living in these conditions is one of the most fundamental and pressing problems of society where the development and improvement of methods and tools of modern information and communication technologies (ICT) create viable opportunities for their use in the system of education (Carnoy, 2005). These are the technologies on which the society pins its real hopes for the establishment of an open distance education system, which would not only enable each and every person to choose their educational tactics, but also allow each and every educational space at national or regional level to actually interact with others and bring such cooperation to the global level (Rowntree, 1996).

To gain insight into the high expectations at European level, we will provide an extract from the European Community Memorandum on the areas where the introduction of distance education can play an important role and on the expected effect thereof:

- extending opportunities of access to and participation in education and training at all levels;
- strengthening the education and training infrastructure of less favoured regions and of remote areas by extending the range of training available in local institutions and directly to individuals and groups;
- creating trans-European networks for training and hence creating a greater cohesion of the European education and training systems for exchange in the field of open distance learning;
- providing continuing education and training for the workforce;

- improving the quality of training programmes through the incorporation of external high quality inputs and by utilizing multimedia competence;
- consolidating partnerships in training both within and between Member States and between institutions and industry;
- supporting the reconversion and innovation of education and training in the countries of Central and Eastern Europe;
- delivering advanced training and disseminating the results of research;
- making available a European dimension in the education and training of those who do not have the opportunity to spend a period of study abroad and in particular providing such a dimension in the in-service training of teachers. (Skujina, 1996)

Distance education in Latvia

LATVIA'S SUSTAINABLE DEVELOPMENT STRATEGY 2030 includes a recommendation for universities to establish training programmes that are fully implemented on the basis of distance education.

Distance education is a reality of modern life. By "distance education" the author first of all means *an efficient technology for providing a set of quality educational services*. It is in this context that distance education should be considered as an important factor in the modernization of the present-day higher education in Latvia.

Currently, distance education in Latvia is offered by 5 universities, 10 institutions of higher education and 3 colleges. One of the private colleges offers training through distance education only.

According to provisional data, (databases for high schools), about 10% of all off-site students pursue distance education courses in Latvia today. Data of the Central Statistical Bureau of Latvia shows that there were 2,788 off-site students in the academic year 2010/2011 (CSB, IZG27, 2011). This figure indicates that the system of distance education is not particularly popular in Latvia, and this happens for several reasons.

First of all, using only one form of communication of knowledge through the Internet is not always optimal. There are many complex issues concerning the compatibility of ICT with human psychology, ease of use and so on. It is usually believed that the Internet is a very simple technology, which does not require almost anything from the user, except for the presence of a computer and network access. However, the situation is more complex. There is a need for *a "humanized" form of contact with the teacher*, the ability to combine information and so on. There is also a need for motivation to acquire knowledge, which arises during communication with teachers, etc. (Badrul, 1997). Distance education is not only a technological innovation, but also *a social innovation* which includes the efficiency of the educational process. What are the most important social functions of this type of training? Above all things is the *enhancement* of each and every person's opportunity to choose the most appropriate *forms of exercising the constitutional right to a quality education* in view of living conditions, psychophysiological characteristics and social status. The introduction of ICT is a response to the need of the modern civilization for the mass and continuing education and for improvement

of its quality level due to the growing requirements towards the consumer and the producer of material and spiritual values. These days, not only the commonality of language, but also the single principle of organizing the information infrastructure of society is crucial for preservation of the nation as a whole. This is an important argument in favour of the introduction of ICT in the educational processes at all levels and by any means possible, as *an individual and a citizen thereby establishes new communication channels with the society and the state*, regardless of where he or she lives (Shailendra, 2005).

There is no alternative to ICT in solving this problem. The two fundamental principles advocated by UNESCO: "Education for All" and "Learning throughout Life" are now complemented by the third principle: "Education at the Place of Residence", which is essentially impossible without reliance on the information and communication technologies (UNESCO, 1996).

Distance education reinforces the importance of *individual approach* to the student. Students acquire knowledge and skills through a variety of individual forms of learning – from self-study of subjects using specially designed training aids and deepening their knowledge through educational computer software to different types of active workshops (business and operating games, discussions, etc.). In this regard, the *expansion of the range of educational opportunities for an individual* is becoming notable (Dede, 1995).

Distance education gives him or her fundamentally new options, providing not only an increased amount of information, but also acquisition of new skills and abilities. Among them is the ability to freely navigate today's databases, interact with members of the academic staff in order to achieve common and socially significant results and increase the level of intellectual development.

Taking into consideration the prospects for distance education, the author has developed quality criteria for distance learning based on the higher education quality assurance system, which operates in accordance with the ENQA Standards and Guidelines for Quality Assurance in the European Higher Education Area adopted during the Meeting of European Ministers of Education held in Bergen on 19th-20th May 2005.

Distance education could significantly improve access to higher education for secondary school graduates from the provinces. The distance education quality criteria developed by the author are included in the *Methodology for Assessing the Activities and Quality of Implementation of Educational Programmes in Educational Institutions and Examination Centres*, which has been designed in accordance with State Cabinet Regulations No. 852 on *Procedures for Accreditation of General and Professional Education Programmes, Educational Institutions and Examination Centres* of 14th September 2010 and adopted on 24th May 2011. Below you can see the two main criteria.

AREA 1. STUDY CONTENTS AND ORGANIZATION
Criterion 1. Study Programmes Implemented by the Educational Institution
Satisfactory:
- Study programme in the form of distance education (via technical and/or electronic means of communication) is implemented in accordance with the university's regulations.

- Teachers plan the sequence of learning the study contents according to the specific features of distance education, ensuring compliance with requirements of the course standards. A relevant implementation methodology has been designed.
- There is a schedule for review sessions on-site and off-site (via e-mail and Skype).

Good:

- Study programme in the form of distance education (via technical and/or electronic means of communication) is implemented in accordance with the university's regulations.
- Teachers plan the sequence of learning the study contents according to the specific features of distance education, ensuring compliance with requirements of the course standards and the intradisciplinary link. A relevant implementation methodology has been designed for the scope of the whole study programme.
- A schedule for review sessions on-site and off-site (via e-mail and Skype) has been drafted for the whole academic year.

AREA 2. STUDIES AND ASSESSMENT OF KNOWLEDGE
Criterion 2.1. Quality of Studies
Satisfactory:

- During the process of studies teachers use teaching methods that meet the principles of distance education.
- Study materials in electronic form have been designed.
- Electronic learning environment provides access to supplementary literature and links to sources of information.
- Tests and practical assignments for self-control have been designed.

Good:

- During the process of studies teachers use a variety of teaching methods that meet the principles of distance education. Self-assessment methods (tests and pass-fail tests) have been planned for each theme of study.
- Electronic learning environment provides access to supplementary literature and links to sources of information.
- Study materials in electronic form have been designed according to the programme. Study materials in printed form are available in the library. Video materials and video lectures are available too. Study materials are regularly updated and supplemented (if necessary or if required by the specific character of the subject).
- Virtual practical assignments can be performed during the study process.
- Tests (for intermediate control and final assessment), laboratory assignments and practical assignments for self-control have been designed.

Criterion 2.2. Quality of Learning
Satisfactory:

- Information on requirements laid down for the studies is available in the e-environment.
- Feedback from the students is enabled. Students have the opportunity to express their views and ask questions, using electronic means of communication.

- Students are given the opportunity to interact via e-mail and Skype.
- Students may contact their teachers at certain times.
- The university monitors the regular fulfilment of the study plan (via pass-fail tests).

Good:

- Information on requirements laid down for the studies is available in the e-environment.
- Feedback from the students is enabled. Students have the opportunity to express their views, ask questions and hold discussions, using electronic means of communication.
- The information exchange system between and among students, teachers and administration has been established.
- Students are clearly informed of the ways to communicate with teachers; the necessary support can be received from teachers during the learning process.
- Students have the opportunity to visit on-site group sessions, review sessions and individual on-site review sessions.
- Students are given the opportunity to interact via e-mail and Skype.
- The university encourages students' interaction through a variety of options, such as Affinity Groups on the university's website, electronic discussion forums, etc.
- The university analyzes the e-environment visit frequency by the students and monitors the regular fulfilment of the study plan (via pass-fail tests). (Vasilevska, 2011)

Distance education quality assurance would bring this type of study to a wider public attention.

The introduction of distance education is an important factor which contributes to the use of new opportunities of high technologies in education and the "export of knowledge". It is a politically important, socially significant and economically sound fact. It is beneficial for Latvia also because thousands of the country's citizens are now working abroad. Many of them are not sufficiently proficient in foreign languages to attend university. To help these people not to lose contact with their country and have a good education on their return, it is essential to give them the opportunity to pursue higher education in their native language. It is a known fact that educated people tend to be better performers, no matter where they work.

First of all, it would be advisable to establish an *association of universities in Latvia, offering export of education.* Export of education services carried out with support from the government will lead not only to economic, but also moral and political benefits and increase the international prestige of this country.

Institutions of higher education that implement distance education are fully capable of self-financing through tuition fees paid by the students. Therefore, the question is not about extra budgetary funds, but about available loans, financial guarantees, etc. Secondly, the *students do need* financial support from the state, and this support should be provided as *tax incentives* for educational institutions which make financial investments in the development of distance education. Experience has shown that the introduction of distance education leads to substantial cost savings by reducing the expenses on transport, construction and operation of new buildings, including dormitories, and a whole range of other items.

Conclusions

The continuously pending questions are: Who to teach and how much time can be allocated to teaching? There are countries which have solved these questions fundamentally for themselves. This does not mean that all problems are solved there, yet the goal has been defined. In the circumstances of knowledge-driven economy, training should be provided to as many people as possible, as intellectual work becomes large-scale. *For Latvia, the introduction of comprehensive higher education lies ahead as a promising strategic national goal.* The use of ICT in education will help in solving this problem (Latvia's Sustainable Development Strategy 2030).

It should be noted that distance education based on ICT, while being an important factor in modernization, is associated with a number of difficulties that impede its use. Among them, for example, is the high cost of teaching aids and latest technologies: not every university can purchase them. Insufficient computer literacy of a large proportion of teachers and students is by no means unimportant. These data confirm that the introduction of distance education facilitates the students' access to new knowledge and more advanced training materials, provides training regardless of their remoteness from the educational institution and helps individualize the learning process. Therefore, in conjunction with other forms of education it promotes quality growth of the intellectual potential of students. Distance education is becoming an important part of the process related to improving the entire education sector in this country.

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EVIDENCE-BASED RESEARCH STUDY OF THE RUSSIAN VOCATIONAL PEDAGOGY AND EDUCATION MOTIVATIONAL POTENTIAL IN THE INTERNATIONALISATION PROJECTION

Abstract

The paper reveals research results of the pedagogical mechanisms influencing the increase of professional motivation of the new century Russian academics within additional vocational training program 'Lecturer in higher educational establishments' focusing on the efficient work in the international educational environment as an outcome.

Introduction

World image and role of university vocational education and training has significantly changed during the last decades. Internationalisation and globalization of education, widening access to its different types regardless of social, ethnic and gender differences, implementation of lifelong learning, accessibility of all sorts of human knowledge, worldwide communication through various technological tools, new horizons opening in educational research and innovative pedagogical practices in vocational pedagogy and education characterize contemporary stage of countries` transition to the knowledge-based society. Such agenda requires a new type of academic, possessing fresh ideas, deeply involved in practitioner research, ready for interdisciplinary scientific discourse within local, national and international environment, fully understanding the values, objectives and expectations of the society based on knowledge and eager to promote the advising role of science and scholarship worldwide.

Unfortunately in some post-Soviet states the popularity of work in education or research among younger generation is not that high due to a number of social and economic reasons. Such a decline in this field was mostly seen on the threshold of the centuries and made it an issue of special concern in education and science policy debates in most of these countries. Russia has not been an exception. After the collapse of the Soviet Union its system of higher vocational education[1] has also faced a number of destructive tendencies manifested in the rise of professional demotivation and disqualification of academics, actualization of issues concerning 'emotional burning out of specialists' and decrease in the attractiveness and prestige of the teacher's profession in the society at large. In Russia it resulted in a number of regulations (1997, 2002) provided by the Ministry of general and vocational education of the Russian Federation concerning state recommendations on organization and implementation of the new programs of additional qualifications 'Teacher'[2] and 'Lecturer in higher educational establishments'[3] in universities throughout the country.

This article provides a critical overview of practical implementation of the vocational training program 'Lecturer in higher educational establishments' at Southern federal university, ranking fourth among classical Russian Universities, at the Department of psychology and pedagogy of higher education which was initially

opened specifically for this purpose in 2006. It also demonstrates the results of the undertaken evidence-based research study aiming at revelation of the mechanisms influencing the increase of specialists` professional motivation within this course of studies.

Program description and its main objective

Academic curriculum of the program is represented by four modules. Although they are detailed in the state requirements to the minimum of content and level of preparation for acquiring the additional qualification 'Lecturer in higher educational establishments' issued by the Ministry of general and vocational education of the Russian Federation in 2002, higher educational establishments have an independent right to choose both some courses from the part of 'Special disciplines' and educational content of the disciplines taught. The length of the program is one year and a half what equals 1080 hours, 360 of which are contact[4].

The first module 'General vocational courses' (320 hours) is represented by four disciplinary fields to study: 'Human psychology' (60 hours), 'Pedagogy' (60 hours), 'History, philosophy and methodology' (100 hours), 'Information technologies in science and education' (100 hours).

The second module 'Special courses' (520 hours) includes 'Additional specialized courses on psychology and pedagogy' (60 hours), 'Technologies of vocational education' (60 hours), 'Organizational bases of the system of education' (60 hours), 'Foreign language' (140 hours), 'Contemporary chapters of disciplines of the scientific field' (140 hours), 'Training of vocationally orientated rhetoric, debate and communication' (60 hours). The first and the third groups of special courses are chosen by the institution itself.

The third module is 'Pedagogical practice' (100 hours) when students get a chance to act as university lecturers at different faculties of the university lecturing and organizing seminars in the sphere of their expertise.

And the fourth one is 'Final state assessment' (140 hours) including preparation and defense of the qualification paper and sitting for the qualification examination. The overall objective of the program is to prepare a future academic for educational and scientific work and it assumes the development of professional motivation and thinking, formation or improvement of teaching skills necessary for the work in the globally transforming international educational environment.

Research design, theoretical background and methodology

After opening the Department of psychology and pedagogy of higher education at Southern federal university program leaders were offered to form the academic curriculum for the additional qualification 'Lecturer in higher educational establishments'. Being a part of the group it was offered by me to address the issues of professional motivation as it seemed reasonable due to the necessity of generation and further modification of the academic curriculum, disciplinary content and finding adequate methical instruments in relation to the 'Special disciplines' concrete list of which is defined by the institution delivering the program. Eventually it was decided to carry out evidence-based research during two academic years (2007/2008, 2008/2009). Two groups of post-graduate students having six

people in each were chosen to be the empirical object of the research during their first year of studies. In each experimental group three out of six post-graduate students were already holding university positions of either professor assistants or academics and others were planning to teach in the future and it was their main motive of participation in this program delivered on the optional basis. The age of participants varied between 23 and 35 years old meanwhile each person in the group had a Diploma of higher education[5] i.e. was a specialist in a specific scientific field.

Theoretical background of the research was represented by the ideas connected with motivation and motives (Iljin, 2002), intrinsic and extrinsic motivation (Zamfir, 1983), motivation bases of teacher's activity (Dubitskii, 2004), motivation inclusion into work (Karpova, 1998) and personal self-actualization (Rubinshtein, 2007). The aim of the undertaken evidence-based research study was to reveal reliable changes in the indicators of the personal professional motivation complex of post-graduate students in the course of studies and define the mechanisms influencing positive and negative dynamics of this variable, modify the training process in accordance with the empirical data obtained.

For this purpose were used various behavioral techniques (in-depth interviews, problem discussions, diagnostic gaming) and '7 point scale of professional motives' – a methodology offered by Zamfir K. and modified by Rean A. (Bordovskaya, Rean, 2001). According to Zamfir`s idea all professional motives are divided into intrinsic and extrinsic. The first ones are generated by social value, satisfaction from work reflected in creativity, participation in organization and management, interaction with people. The second ones are divided into positive extrinsic motivation (desire for prosperity, career growth, and approval of one's achievements by the society) and negative extrinsic motivation (the system of punishment, fines, disciplinary penalties and other ineffective influence on the person). Zamfir`s ideas that creative work is impossible on the basis of extrinsic motivation and its efficiency is determined exclusively by intrinsic motivation were also taken into account. It is obvious that negative extrinsic motivation restricts person's professional development and atrophies his/her internal needs and interests. Positive extrinsic motivation shows its effectiveness only during a very short period and it weakens as soon as stimuli disappear or neutralize.

Research outcomes and their effect on educational process

Two groups of post-graduate students underwent the same stages of experiment during their first year of studies. At the first stage of research respondents were diagnosed the level of their professional motivation with the help of '7 point scale of professional motives'. After the first stage of experiment I calculated the index of the student's intrinsic (IPM), positive extrinsic (PEPM) and negative extrinsic professional motivation (NEPM) (according to Zamfir`s formula) and the interpretation of the results showed disbalance between these three when summing up professional motivation complex (PMC) of the group. It is important to mention that PMC is made up of correlation between 3 above mentioned types of motivation. Optimal motivation complex may be represented by two types of correlation: IPM > PEPM > NEPM and IPM = PEPM > NEPM. The worst motivation complex may be represented by the type: NEPM > PEPM > IPM. But anyway it is important to consider the intensity of each type of motivation even within one motivation

complex. So, the results of the first group, before doing the program were (3,3>2,4<2,6), it was not the worst motivation complex, but the idea was to increase the level of IM and stabilize two other variables by the end of the academic year.

To achieve better parameters an assumption was made that changing of the paradigm of pedagogic targeting resulting in the transfer from technocratic approach[6] to the concept of personal self-actualization may influence the increase of the level of professional motivation of future academics. The latter one is supposed to have personally orientated influence on the student helping to form integrally understood mentality characterizing individual's world outlook, life priorities and behavioral motivation in all spheres including a vocational one. It was offered to build up all the course structure and delivery bearing in mind this idea.

On the first stage of the experiment it resulted in introduction of a serious of courses worked out by my colleagues and myself such as 'Pedagogical epistemology', 'Education in contemporary world', 'Quality assurance of education' (Chigisheva, 2007), 'Developing students` personality in the process of education and upbringing' (Chigisheva, 2007) etc. the content of which was designed so as to form professional reflexivity through familiarization of students with the models of other humanitarian experiences and necessity to widen their own educational continuum. At the end of the year the group was diagnosed again and the results (3,6 >2,5<2,6) showed positive dynamics in all positions, the biggest changes were in IPM with the increment factor of 0,3.

Nevertheless it showed rather low professional motivation effectiveness of the courses offered, so the next year it was decided to renovate the previous ones by wider introduction of inquiry based approaches and reinforce teaching practices with appropriate methods and teaching techniques. It became possible through the usage of case studies, project work, research-teaching linkages, individual writing and reading tasks on the difficulties of person's teaching experience and constant debate between staff and students in the logic of new understanding of the educational process and its qualitatively new pedagogical projections under the influence of internationalisation. During 2008/2009 academic year working with the second group I tried to follow the same strategy in developing the research. So, the first stage results of the group were 3,4>2,8<2,6 vs. 4,0>3,0<2,6 by the end of the study course.

IPM growth equaled 0,6 but at the same time PEPM showed 0,2 growth as well. Such course design proved its greater effectiveness and positive trend. Besides that the students themselves told about the changes in the interest in teaching and some of them even planned to write instructive materials for students in disciplines they were already teaching.

Conclusion

Evidence-based research study of the mechanisms influencing the increase of professional motivation of specialists within additional qualification 'Lecturer in higher educational establishments' conducted within two academic years proved its necessity and value. It helped to balance the curriculum of the program in accordance with the professional motivation measurement results, build up ways of further program improvement and enhance the outcomes of the program for students. It should also be noticed that it had a positive professional effect not only

on individuals participating in the program but also on the staff of the Department. Those involved stated positive changes in their teaching skills, improvement of communication skills with post-graduate students in the groups and greater wish to use elements of other sociocultural and educational traditions in their own teaching practices. The methodology addressed in the study is supposed to be used for monitoring educational and professional effect of this program in the future and tracing acuteness of other vocational programs taught at the Department.

Acknowledgments

Notes

1. In Russia all levels of education provided by different educational establishments after a minimum level of school education are called vocational.

2. The program is offered for university graduates getting a Diploma of Higher Education in the chosen field; usually it only provides a right for teaching in secondary schools.

3. The program is offered for Masters, postgraduate students or academics having no less than two years experience of teaching in higher educational establishments and having no pedagogic education. It provides a right for teaching in the sphere of tertiary education.

4. In Russia it is a usual practice that contact hours take up to two thirds of total hour length of vocational educational program although the correlation may vary from institution to institution.

5. Diploma of the specialist is given to the students after 5 years of study at any higher educational establishment in Russia. It is an aftereffect of the Soviet system of higher education which is being displaced now by the European system of degrees.

6. Technocratic approach was widely used in the system of Soviet higher vocational education and directed at fuller satisfaction of state requirements aimed at progressive economic, technical and industrial development. In the conditions of social egalitarianism the person acted a role of a 'cog in the machine' and person's labor activity was reduced to simple mastery performance lacking initiative and responsibility for its results, quality and ability for individual decision-making. Within the years this idea of 'mass person's development' proved its groundlessness in relation to the concrete individual.

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САЛТАНАТ ГАНИЕВНА ТАЖБАЕВА

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ФОРМИРОВАНИЕ ЗДОРОВОГО ОБРАЗА ЖИЗНИ ВО ВНЕУЧЕБНОЙ ДЕЯТЕЛЬНОСТИ СТУДЕНТОВ В ВУЗЕ

HEALTHY LIFESTYLE FORMATION WITHIN THE EXTRA-CURRICULAR ACTIVITIES OF STUDENTS AT UNIVERSITIES

Abstract

This study is dedicated to the formation of the healthy lifestyle in pre-service education of students at universities. The formation of habits and demands to physical exercises and personal hygiene helps students more rationally utilize their free time, which is necessary for preparation to perform their future professional duties at schools.

Одной из актуальнейших задач Республики Казахстан в настоящее время и в XXI веке является оздоровление населения, в том числе и средствами физической культуры, на который нацелены Послания Президента страны народу «Казахстан – 2030» и программа оздоровления, утвержденная расширенной коллегией Министерства образования, культуры и здравоохранения от 20 ноября 1997 года.

С 2001 года КазГосЖенПи ведет активную целенаправленную работу по внедрению проекта ВОЗ «Здоровые университеты в Казахстане». В настоящий момент институт находиться на стадии возрождения и активизации и полностью поддерживает принципы здорового образа жизни, изложенные в Послании Президента «Казахстан – 2030», Государственной программе «Здоровье народа» и стратегии ВОЗ «Здоровье для всех». Идеи здорового образа жизни входят в основу учебной воспитательной работы ВУЗа:

- ообъединение усилий кафедр, дисциплин;
- формирование комплексного подхода, направленного на воспитание гармоничной личности;
- разработка учебных технологий, основывающихся на творческих программах по каждой дисциплине, тесно связанных с аналогичными базовыми курсами;
- использование новых тенденций в спорте (фитнес, стренчинг, каланетика, стрит-бол, аэроденс и др.);
- обеспечение учебного процесса квалифицированным и специально подготовленным преподавательским составом;
- достаточная материально-техническая база.

Учебная программа «Казахская леди – вузовский компонент», разработанная авторским коллективом КазГосЖенПИ объединяет все перечисленные моменты. Решением Учебного совета уже два года апробируется инновационная программа в учебных аудиториях ЖенПИ. Ее разработчики видели

свою задачу в синтезе духовно нравственного содержания этнического и евразийского менталитета, добиваясь унисона народных традиций и требований современной деловой жизни. Программа по своему содержанию вариабельна и за счет большого количества самостоятельных составляющих может намного оперативнее, чем базовые вузовские программы реагировать на возникающие потребности учебного процесса, исключать какие-либо предметы, вводить новые. Являясь прикладной дисциплиной, вузовский компонент отвечает на вопрос «как?», охватывая все сферы жизнедеятельности студенток: публичную, профессиональную, приватную, семейную. Программа подкреплена солидной материально-технической базой и обеспечена квалифицированным преподавательским коллективом.

Учебно-методический комплекс включает в себя три блока:
– «Деловая коммуникация на иностранном языке»;
– «Информатизация образования»;
– «Патриотизм, гражданственность, нравственность».

Последний блок, самый большой по количеству дисциплин, он обязательно ориентирован на гармонию нравственного и физического здоровья, включает самостоятельные дисциплины *сулулыктану* и *аэрофитнесс* – широкий спектр средству физической подготовки в оздоровительных целях на базе «аэробических» форм проведения занятий (групповые фронтальным расположением занимающихся и музыкальным сопровождением).

Создатели программы исходили из убеждения, что в современном обществе с его динамичностью, возникновением нового информационного пространства занятия физической культуры не могут носить просто формальный характер. Они должны быть не просто зрелищными и увлекательными, но и более результативными, дифференцированными и обязательно включать системы тестов, которые будут информативными только для преподавателя, но и самого студента, покажут успех, он достиг за период тренировок.

Создавая программу ЖенПИ, ставят перед собой задачи:
– воспитать у студенток потребность в здоровом образе жизни, не навязывая ее извне;
– дать им практические знания об анатомии и физиологии женского организма, его скрытых резервах;
– убедить в необходимости постоянно работать над собой;
– рационально использовать свой физический потенциал;
– получать удовольствие от занятий физическими упражнениями.

Институт является научно-практическим центром эксперимента и внедрения в жизнь программу «Самопознание», автором которой является президент фонда «Бобек» С. А. Назарбаева. Институт выиграл проект – грант – «Научно-методологические основы формирования здорового образа жизни в системе высшего образования Республики Казахстан». Мероприятия по формированию здорового образа жизни и укрепления здоровья среди студенческой молодежи Республиканском, городском, районных уровнях службами здравоохранения, образования. Это широкомасштабные акции, конкурсы, фестивали, месячники, декадники, тренинги, семинары, лекции,

телепередачи, радиопередачи, научно-практические конференции, клубы, диспуты, дебаты, круглые столы, пресс-конференции. В институте создан НИИ гендерных исследований, целью и которого является разработка социальных и образовательным программ для молодежи, создан «социально-психологический портрет студентки КазГосЖенПИ». Идеи ЗОЖ активно внедряется на микро и макро уровне ЖенПИ. Так, в Сенате молодежи создан комитет по здоровому образу жизни, имеется группа волонтеров – студентов из 35 человек, пропагандирующих идеи ЗОЖ в Алмалинском и Жетысуском районах г. Алматы. Взяты под опеку организации:

– лицей «Дара бала»;
– колледж «Казнур»;
– детский приемник распределитель;
– детский дом № 2;
– госпиталь для ветеранов;
– школа № 131;
– факультет для казахской диаспоры и оралманов.

Проект ВОЗ «Здоровые университеты» являются одним из эффективных методов и инструментов формирования здорового образа жизни и укреплению здоровья среди студенческой молодежи, результаты которого значительно отразились на показателях института по качеству знаний и успеваемости, а также по индексу здоровья студентов. Если мы говорим об особенностях физического воспитания в высшей школе, мы должны строго определить его задачу исходя из особенностей сотрудничества как социальной, возрастной группы. Совершенно очевидно, что помимо физическое воспитание в вузе не может сводиться только к комплексу физических упражнений, ограничены по времени суммой академических часов. Кафедры физвоспитания, ректораты вузов вынуждены решать узкоспециальные задачи, связанные с необходимостью компенсировать вредные последствия образа жизни студентов с одной стороны, и задачи формирования особенных физических качеств молодых специалистов. Это значит заниматься профессионально-прикладной подготовкой будущих специалистов. Формируя у них те, физические качества, которые обеспечивают готовность к предстоящей профессиональной деятельности. Так отличительной особенностью работы со студентами – технических вузов и факультетов (математиками, физиками, химиками) для которых характерна напряженная умственная работа при минимальной двигательной активности является развитие выносливости, навыков концентрации внимания в течение длительного времени, снятия статического мышечного напряжения плечевого пояса (на которое приходится основное напряжение во время работы в лаборатории), повышение сопротивляемости организма вредным воздействием. В отличие от них студенты естественнонаучных факультетов, которым по роду их профессиональной деятельности придется проводить большое количество времени в полевых условиях должны быть физически готовы к большим нагрузкам в том числе и опорно-двигательного аппарата (уметь плавать, преодолевать препятствия, передвигаться в горах и на труднодоступных участках). Что касается студентов педагогических вузов, наших студенток, которые в скором времени должны сами стать организаторами физического

воспитания детей в школах и детских садах, то важными задачами физического воспитания становиться:

– формирование у студенток сознательной потребности в здоровом образе жизни;
– ознакомление с методикой физического воспитания, освоение как можно большего количества подвижных и спортивных игр, различных видов спорта, в которых предусмотрены зачетные нормативы;
– улучшение состояния здоровья и функционального развития организма студенток.

Именно эта последняя задача является наиболее важной и наиболее сложной для решения. Как уже было отмечено выше студенчество представляет собой особенную социальную и возрастную группу, на которую приходится пик умственных и эмоциональных нагрузок и только в единичных случаях оно совпадает пиком спортивной формы человека или хотя бы сопровождается сознательным отношением к своему здоровью.

Период обучения в вузе характеризуется рядом особенностей, которые делают его совершенно особым в жизни человека. Студенческие годы называют лучшими годами в жизни человека, но многие специалисты в том числе педагоги и медики солидарны в том, что период в жизни человека изобилует множеством негативных факторов. Это в первую очередь: большое нервно-эмоциональное напряжение, особенно в периоды экзаменационных сессий, малоподвижный образ жизни, отсутствие режима дня, утомительные умственные нагрузки. Если к этим основным факторам добавить ряд второстепенных, таких как слабая функциональная подготовка выпускников средних школ, которая автоматические переносится на вузовский контингент; оторванность студентов от семьи и собственную слабую подготовленность в вопросах введения здорового образа жизни и поддержанию своего здоровья; отсутствие реальной заинтересованности администрацией и педагогических коллективов вузов в сохранении и укреплении здоровья и физической подготовленности своих выпускников.

Подготовка студентов педагогических вузов к формированию здорового образа жизни является одной из главных задач в работе куратора группы.

Как уже было отмечено выше, выпускники КазГосЖенПИ, как и других педагогических вузов, трудятся преимущественно в системе образования; в детских садах, общеобразовательных школах и в колледжах. Они выполняют функции воспитателя, методиста, учителя, преподавателя колледжа, средних и высших учебных заведений.

В их учебно-воспитательном процессе соответствующее место должны занимать физкультурно-спортивные и оздоровительные мероприятия. Следовательно, нужна соответствующая специализированная подготовка к этому виду организационно-педагогической деятельности. Особое внимание в нашей опытной работе мы уделяли организации физкультурно-оздоровительной работы в условиях студенческого общежития. Так, в общежитиях физико-математического, музыкально-педагогического факультетов систематически проводится утренняя гимнастика, студенты активно посещают различные спортивные клубы и секции. Привлечение студентов к занятиям спортом, формирование у них потребности и привычек к физкультурно-

оздоровительной работе, личной гигиене помогают им более рационально использовать свое свободное время в подготовке к выполнению своих профессиональных обязанностей в школе.

Используемые в нашем опыте массовые формы внеаудиторной деятельности студентов не являются новыми и оригинальными. Однако, как показывает наше исследование, в реальной практической деятельности педвуза многим из них не уделяется внимания. Кроме того, как правило, их применение далеко не всегда преследует задачи профессионально-этического воспитания учителя. Массовые формы внеаудиторной работы значительно дополняют и обогащают знания студентов в области педагогической этики, создают условия для их эмоционального переживания, теоретического обобщения, практического применение.

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ТУРСЫНБЕК МЫРЗАХАНОВИЧ БАЙМОЛДАЕВ

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УПРАВЛЕНИЕ ШКОЛОЙ НА ОСНОВЕ МЕНЕДЖМЕНТА

MANAGEMENT BASED ORGANISATION OF SCHOOL'S EDUCATIONAL PROCESS

Abstract

This paper focuses on the organization of school management based on the following criteria: managerial, educational, communicational, research. The author discuses the main principles that shape the school management based governance – respect to person, entire person's view, cooperation, social justice, individual approach, diversification, stimulation, permanent qualification improvement, collective decision taking, teacher participation is school management, purpose harmonization, and innovations and development.

The author shows the phases of management operation – goals definition, taking decisions, organization, and control. The main characteristics that determine the school management activities are presented. The author underlines the importance and complicated nature of school management.

Специфическая, относительно самостоятельная часть педагогической науки, рассматривающая задачи, содержание и методы управления школьным делом, принято называть *школоведением*. Стало быть, школоведение представляет собой основную часть управления образованием. В 60-годы прошлого века произошло осмысление школоведения как важного компонента педагогической науки, возобновился интерес к научной организации труда педагога и руководителей педагогических коллективов. Дальнейшее обогащение знаний о в области школоведения создало основу формирования новой отрасли – педагогического менеджмента.

Управление школой на основе менеджмента предусматривает подчинение управляющей деятельности нижеследующим принципам.

1. Уважение к человеку и доверие к нему. Данный принцип относится как к педагогическому работнику, так и к школьнику. Он является той базой, на которой строится деловое сотрудничество в системах «руководитель-педагог» и «педагог-учащийся».

2. Принцип целостного взгляда на человека (в первую очередь, на школьника) как на личность. Когда семилетний ребенок приходит в первый класс, для учителя он должен быть, прежде всего, человеком, личностью, а потом уже школьником. Учитель для руководителя школы также должен быть, прежде всего, человеком, личностью с его характером, со всеми сложившимися индивидуальными качествами, а потом уже учителем. Взгляд на него должен быть целостным как на носителя разных качеств – человеческих, физических, профессиональных и т.д.

3. Принцип сотрудничества предусматривает перевод управления с монологического на диалогическое общение, т.е. переход от коммуникации, передачи информации к общению. Заметим, что авторитарное руководство основано на коммуникации, демократическое – на общении.

4. Принцип социальной справедливости предусматривает такое управление, когда каждый учитель находится в равном положении со своими коллегами, а его взаимодействие с администрацией строится как цель управления, а не средство.

5. Принцип индивидуального подхода к учителю. Этот принцип означает, что менеджер обязан учитывать индивидуальные особенности каждого учителя, уровень его подготовки, социальную среду его проживания и т.п. Здесь уже проявляется конкретизация управления. Менеджер видит в этой ситуации предел возможностей конкретного учителя, а, значит, предел требовательности к нему.

6. Принцип обогащения работы учителя. Суть этого принципа заключается в стремлении разнообразить работу учителя, пробудить и поддерживать в нем профессиональный интерес к своему труду, вселить уверенность в действиях. Для этого следует определять перспективу профессионального роста каждого учителя, не держать его из года в год на какой-то конкретной группе классов, дать возможность расти в классах, освоить конкретную учительскую деятельность от младших до выпускных классов; дать возможность посещать уроки в других школах, участвовать в семинарах, круглых столах, симпозиумах.

7. Принцип личного стимулирования. Известно, что любая деятельность требует стимулирования деятеля. При этом стимулирование может быть и материальным, и моральным.

8. Принцип перманентного повышения квалификации. Менеджмент школы требует постоянного формирования мотива повышения квалификации. И чтобы это повышения было действительно перманентным, т.е. непрерывным, необходимо осуществлять его через соответствующие социальные институты и через собственный коллектив.

9. Принцип коллективного принятия решения на основе консенсуса. Консенсус в школьном коллективе не должен превращаться в навязывание каких-либо идей или решений. Речь может идти не о насильственном «внедрении», а о творческом «освоении».

10. Принцип участия учителей в управлении школой. Управление должно быть организовано так, чтобы учитель чувствовал себя в школе не служащим, а хозяином. И процесс такого преобразования должен быть для самого учителя постепенным, незаметным.

11. Принцип целевой гармонизации предполагает, что в школе появляется целевое единство, когда личные профессиональные цели учителя соответствуют общей цели школы.

12. Принцип обновления и развития требует, чтобы любые крупные изменения в школе подготавливались заранее, в т.ч. и изменения теоретического порядка. Нужна постепенная подготовка для освоения нового, нужен детальный план и расчет. Любые изменения следует начинать с формирования потребности в непрерывном саморазвитии.

Основные направления деятельности директора школы

Директор школы должен четко представлять, какой должна быть (или может быть) в идеале школа, с учетом тех материальных, духовных, социальных факторов, которые сложились в данном регионе. Он должен также знать фактическое состояние дел в своей школе данный период. Идеальное состояние школы – это цель работы директора и его коллектива. И они (директор и педагогический коллектив) должны стремиться максимально приблизить сегодняшнее состояние школы к идеальному, исходя конкретных возможностей.

Эта работа директора составляет первый блок управленческой деятельности директора собственно ***управление.*** Второй блок работы директора – ***педагогический.*** Ясно, что деятельность директора школы должна носить педагогический характер. Его управленческое воздействие специфично и по объекту управления (учителя и учащиеся), и по сфере обслуживания (школа). Характерно, что в теории управления производством также выделяется педагогический аспект деятельности руководителей, их воспитывающее воздействие на трудовой коллектив.

Третий блок в деятельности директора школы – ***коммуникативный***. Социально-педагогические методы управления выделяют ее компоненты: сплочение учительского коллектива, формирование общественного мнения, оптимизация межличностных отношений, создание состояния удовлетворенности, повышение творческой активности членов коллектива. Отношения директора с работниками школы, с родителями и общественностью составляют важную сторону его управленческого труда, поэтому выделение в структуре деятельности директора коммуникативного блока представляется правомерным.

Четвертый блок – ***исследовательский***. Усиление воспитательной функции общеобразовательной школы в условиях реформирования общества потребовало поиска новых средств повышения качества работы школы. Одним из путей повышения качества и эффективности учебно-воспитательного процесса является глубокое изучение состояния дела, вдумчивый анализ, постоянная потребность внедрения результатов научного исследования в практику. Выделение специального исследовательского блока в деятельности директора обусловлено увеличением его доли в работе руководителя насущными потребностями совершенствования управления школой.

Основу успешного руководства школой составляют психолого-педагогические знания и умения, а также знание основ управления образовательным процессом, педагогическим и ученическим коллективами и другими объектами управленческой деятельности директора.

Директор школы нуждается в большом запасе управленческих форм и методов. Он должен обладать также умением, ставить цели, исходя из современных социальных требований к образованию и воспитанию; конкретизировать цели в виде задач, которые необходимо решать в разных сферах школьной деятельности, в своей руководящей работе; проектировать и планировать работу всей школы и ее отдельных участников.

Выполнение должностных обязанностей требует от директора школы широкого кругозора, большой научно-теоретической и методической

эрудиции в преподавании своей учебной дисциплины, осознания современных требований к преподаванию других учебных дисциплин, высокого уровня личного педагогического мастерства, постоянного совершенствования и творческого поиска в сферах профессиональной и управленческой деятельности. Его управленческая деятельность может быть представлена в виде совокупности циклов, состоящих их взаимосвязанных звеньев. Можно указать следующий порядок звеньев *управленческого цикла*:

1. Определение цели – обзор, сбор, анализ, обработка информации о состоянии управляемой подсистемы.
2. Принятие решения – планирование путем реализации решения.
3. Организация выполнения решения.
4. Контроль – анализ и оценка результатов деятельности с помощью системного подхода. При анализе деятельности директора школы можно дать целостную ее характеристику, определить место в системе «школа», выявить составляющие элементы в структуре, установить, как функционирование системы деятельность директора происходит в рамках управленческого цикла.

Независимо от того, какие цели преследует цикл управления, какими временными рамками его ограничивает руководитель, не зависимо от объема и объекта, на упорядочение или развитие которого направляется воздействие цикла, он всегда будет состоять из пяти традиционных управленческих функций: *изучение и анализ состояния дела, решения и планирование, реализация решений, регулирование и контроль.*

Эти функции направлены на управляемый объект и во взаимодействии с ним представляют собой конкретные формы проявления сущности и содержания процесса управления в школе.

Управленческое мышление директора школы

Управление школой представляет собой систему планомерной организации школьного дела с соответствующими научно-педагогическими и организационными функциями, оптимально обеспечивающими социально-экономическое и организационно-педагогическое функционирование процесса обучения и воспитания подрастающего поколения.

Управленческая деятельность в школе – «это не приказы, команды, давление на людей, а осторожное, целенаправленное формирование отношений между ними, это продуманная координация деятельности руководителя, это создание оптимальных условий для успешной работы людей, это выработка системы суждений во взаимодействии учителей, это определение философии, стратегии и тактики школьного бытия» (Ю. А. Конаржевский). Таким образом, управление в школе требует определенного *управленческого мышления* директора школы. Подобное мышление характеризуется нижеследующими характеристиками.

1. Человеческая направленность мышления руководителя; переход от технологичности к гуманизации как важнейшее проявление ценностного подхода к личности.

2. Усиление социальной функции мышления требует осознания, что «вложения в человека» – самое прибыльное вложение капитала.

3. Фокусирование мышления на доверии и уважении человека, при котором и взгляды меньшинства принимаются с уважением, интересом и вниманием.

4. Демократизация мышления. В данном случае имеется в виду ослабление вертикальных структур и укрепление горизонтальных.

5. Иной взгляд на место и роль руководителя (менеджера). Он, прежде всего, организатор деятельности предприятия (школы), организатор людской воли.

6. Усиление значения целеполагания. Необходимо обеспечить превращение персональных целей в общую цель предприятия (школы).

7. Смена акцентов в управлении от централизации к его децентрализации, к автономизации, к самостоятельности школы, к полной ответственности директора.

8. Разработка философии качественного и результативного труда, профессионального управления всем образовательным процессом, обеспечивающее качество на всех его участках. Иными словами, усиление системности управленческого мышления, системный подход к процессу управления.

9. Безинерционность мышления менеджера: степень опоры на прошлое должна быть разумной, не должно быть крепкой привязанности к старому опыту. Следует использовать только то, что наиболее ценно и необходимо для данного конкретного случая.

Очевидно, что менять устоявшееся мышление руководителя – это весьма сложный процесс. Такие изменения имеют постепенный характер, над ними следует проводить систематическую работу и разными путями: через соответствующие курсы обучения, через средства массовой информации, через практический показ деятельности и носителей такого мышления и т.д.

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САНИМ КОЖАЕВНА КОЖАЕВА

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МОДЕРНИЗАЦИЯ ВЫСШЕЙ ШКОЛЫ В КОНТЕКСТЕ БОЛОНСКОГО ПРОЦЕССА В РЕСПУБЛИКЕ КАЗАХСТАН

MODERNIZATION OF HIGHER EDUCATION IN THE CONTEXT OF THE BOLOGNA PROCESS IN THE REPUBLIC OF KAZAKHSTAN

Abstract

The paper examines the problems of modernization of the higher education system in Kazakhstan in the context of the Bologna process. The author explains the essence of the Bologna process and compares the common features and differences in the Bachelor and Master's degrees in European countries and Kazakhstan. The study includes some considerations on the PhD degree as well. The author concludes that the participation of Kazakhstan in the Bologna process will be of benefit for Kazakh students and graduates to get international recognition of their academic degrees and qualifications.

В настоящее время в республике все более активно вовлекается в процессы глобализации образования. Примером тому служит участие Казахстана в Болонском процессе. Частный политический процесс, направленный на усиление подготовки и мобильности квалифицированных кадров, равномерности распределения человеческих ресурсов в странах Европейского союза, стал основой для реформирования национальной системы высшего профессионального образования в Республике Казахстан.

«Болонским» принято называть процесс создания странами Европы единого Европейского пространства высшего образования (ЕПВО), в которой были сформулированы основные цели, ведущие к достижению сопоставимости и, в конечном счете, гармонизации национальных образовательных систем высшего образования в странах Европы. Основные идеи Болонской декларации исходят из Великой хартии университетов — Magna Charta Universitatum (Болонья, 1988) и Сорбоннской декларации (Париж, 1998). Цель Болонского процесса — расширение доступа к европейскому образованию, в том числе, посредством введения сопоставимой системы ступеней высшего образования, применения Европейской системы переводных зачетных единиц — ECTS, выдачи выпускникам вузов общеевропейского Приложения к диплому на основе зачетных единиц. Это позволит обеспечить трудоустройство выпускников, поскольку все академические степени и другие квалификации будут ориентированы на европейский рынок труда.

В настоящее время Болонский процесс (БП) объединяет более 45 стран. В соответствии с принципами Болонской декларации в Казахстане с 2010 года введена многоуровневая структура высшего и послевузовского образования: бакалавриат-магистратура-докторантура (PhD).

Как соотносятся уровни образования в странах Европы и Казахстане?

Двухуровневая система высшего образования (бакалавриат-магистратура) была закреплена в «Декларации о гармонизации архитектуры европейской системы высшего образования», подписанной министрами образования Франции, Италии и Великобритании 25 мая 1998 г. в Сорбонне.

В рамках договоренностей достигнуто соглашение о том, что получение диплома первого уровня высшего образования (бакалавра) требует набора от 180 до 240 академических кредитов.

С этого времени в Европе степень бакалавра является высшем образованием, но в известной мере ограничивает свободу трудоустройства. Это проблема существует и обсуждается, в том числе и на встречах Министров стран, участвующих в Болонском процессе, например, эта проблема поднималась в Бергене в 2005 г.

По Болонским соглашением длительность обучения в бакалавриате может определяться как в масштабах национальных систем высшего образования, так и на уровне конкретного вуза. Как правило, в европейских странах все больше начинает преобладать бакалавриат с 3-х летним сроком обучения, особенно это касается тех стран, где эта степень ранее не существовала.

Бакалавриат в Европе в целом дает образование, достаточное для трудоустройства, однако, в основном готовит студента к дальнейшему обучению. Продолжительность обучения на этом уровне в разных составляет 3 или 4 года.

Магистр науки 1-2 года обучения	Магистр по профессии 1-2 года обучения	Интегрированный магистр 5-6 лет обучения

Бакалавр 3-4 года обучения

Рис. 1: Сроки обучения в бакалавриате и магистратуре в соответствии с болонскими соглашениями.

Налицо явное отличие нормативных требований в Республике Казахстан: при получении образования в бакалавриате минимальный порог 128 кредитов. По казахстанским стандартом длительность обучения в бакалавриате по всем направлением и составляет 4 года.

Второй уровень высшего образования по Болонским договоренностям назван магистратурой, а его выпускник – магистром. Срок обучения на степень магистра определен в 1 или 2 года, что зачастую зависит от длительности обучения в бакалавриате. Так если бакалавр в конкретном вузе учится 3 года, то магистратура должна быть 2 года, если бакалавриат 4 года, то магистратура 1 год.

Как видим, в сроках обучения имеются некоторые отличия: в Казахстане профильная магистратура 1 год или 1,5 года, а научно-педагогическая магистратура – 2 года, но данные сроки никак не связаны с длительностью обучения в бакалавриате и жестко фиксированы. «Нормативная продолжительность освоения образовательной программы научной и педагогической

магистратуры составляет 2 года. Нормативная продолжительность освоения образовательной программы профильной магистратуры составляет 1-1,5 года в зависимости от специальности и предшествующей подготовки» (ГОСО Послевузовское образование. Магистратура. Основные положения ГОСО РК 5.04.033-2008).

«Основным критерием завершенности образовательного процесса в магистратуре является освоение магистрантом: при профильной подготовке – не менее 24 кредитов (со сроком обучения 1 год) и не менее 36 кредитов (со сроком обучения 1,5 года), при научной и педагогической подготовке – не менее 46 кредитов. В случае досрочного освоения образовательной программы магистратуры и выполнения предусмотренных к ней требований, магистранту может быть присуждена академическая степень «магистр» независимо от срока обучения» (ГОСО Послевузовское образование. Магистратура. Основные положения ГОСО РК 5.04.033-2008).

Следует отметить и еще одну принципальную особенность: в Европе на медицинские вузы и вузы инженерно-технического профиля общепринятые для бакалавриата сроки обучения не распространяются, как не распространяются на них зачастую и двухуровневая модель образования.

Европейские ученые вполне обоснованно полагают, что по некоторым направлениям профессиальной подготовки образовательные программы невозможно разделить на два уровня – бакалавриат и магистратуру. В этом случае считается приемлемым в порядке исключения из общей стратегии Болонского процесса принимать абитуриентов на учебу сразу на 5 лет с вручением им по окончании обучения диплома магистра. Это решение обсуждалось на съезде ректоров европейских вузов в Саламанке в 2001 г. – такая учебная траектория получила название «*интегрированный магистр*».

В данном случае мы видим, что казахстанские вузы в бакалавриате по всем направлениям, как правило, унифицировали сроки обучения до обязательных 4 лет (исключение составляют медицинские вузы и отдельные немногочисленные направления, например, ядерная физика – срок обучения 5 лет). Получить интегрированного магистра в Казахстане нельзя ни по одной специальности.

При обсуждении двухуровневой системы в европейских странах введено две разновидности степени магистра – «*магистр науки*» (или «*магистр-исследователь*») и «*магистр по профессии*». Магистр науки ориентирован на дальнейшую исследовательскую работу, магистр по профессии ориентирован на работу на производстве или в системе управления в рамках своего направления профессиональной подготовки.

Магистр профильного направления 1-1,5 лет обучения	Магистр научно-педагогического направления 2 года обучения

Бакалавр 4 года (5лет) обучения

Рис. 2: Сроки обучения в бакалавриате и магистратуре в соответствии ГОСО бакалавриате и ГОСО магистратуры РК.

Третий уровень непрерывного образования в едином европейском образовательном пространстве – доктор наук. Срок обучения европейского докторанта с последующей защитой докторской диссертации определен в 3 года. На форумах Европейской ассоциации университетов неоднократно поднимался вопрос о том, что докторанты часто не укладываются в отведенные три года, так как написание докторской диссертации – процесс целиком творческий и не всегда поддается внешнему регулированию по времени. Европейский опыт решения этой проблемы, в общем, сводится к тому, что в качестве административной меры после трех лет работы незащитившийся докторант перестает получать финансирование своей работы над диссертацией, защищать же ее он может по мере ее готовности. В Казахстане длительность обучения в докторантуре (PhD) по всем направлениям составляет 3 года.

Таким образом, в Европе в свете Болонских реформ доминирующей является модель: бакалавриат 3(4) года + магистратура 1(2) года + докторантура (3) года, а в Казахстане принята несколько отличающаяся схема: бакалавриат 4 года + магистратура 1(2) года + докторантура PhD (3 года).

Мы считаем, что плюсы вступления в Болонский процесс это – признание казахстанских дипломов в международном пространстве; мобильность студентов в будущем, что предусматривает их переводы в различные европейские ВУЗы.

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О ПРОБЛЕМЕ САМООПРЕДЕЛЕНИЯ ЛИЧНОСТИ

ABOUT THE PROBLEM OF SELF-DEFINITION OF PERSONALITY

Резюме / Abstract

Рассмотрены вопросы самоопределения личности школьника. Дан анализ существующих исследований по данной проблеме. Указаны противоречия, препятствующие успешному профессиональному самоопределению личности.

This paper considers the problems of self-definition of personality of pupils. It gives analysis of existing research on this problem. The study shows various contradictions preventing from successful professional self-definition of personality.

Решение современных задач социально-экономической модернизации жизни государства и общества выдвигает на первый план проблему самоопределения личности подрастающего поколения. Поэтому данная проблема постоянно находится в центре внимания исследователей – психологов, социологов, педагогов. При этом особое внимание заслуженно уделяется вопросам профессионального самоопределения.

С точки зрения профессионального самоопределения подростка, задача школы состоит не в том, чтобы склонить его к определенной профессии и подготовить к безальтернативному выбору. Целостный подход к данной проблеме предполагает рассмотрение профессионального самоопределения подростка как глубоко личностную, внутреннюю деятельность, направленную на самостоятельное построение своей жизни, на осмысленный выбор профессионального пути на основе осознания своих особенностей. Для подростка должны быть созданы условия, при которых он был бы в состоянии самостоятельно выбирать сферу будущей профессиональной деятельности, ориентируясь не только на собственные интересы, но и на потребности общества, на перспективы социально-экономического развития государства.

Современное производство, отходящее от гипертрофированных форм узкой специализации к интегративному характеру профессиональной деятель-ности, требует подготовки компетентных работников. Профессиональная мобильность, готовность человека к конкурентной борьбе за рабочее место, переквалификации и даже смене профессии должны формироваться еще в школе. Таким образом, творческое отношение к делу, адекватная само-реализация в сфере труда – это и личностно, и общественно значимая ценность. Профессиональное самоопределение выступает как один из наиболее значимых компонентов профессионального становления человека и как критерий успешности протекания этого процесса.

Профессиональное самоопределение является составной частью целостного жизненного самоопределения, оно выражает отношение личности к профессионально-трудовой среде и способ ее самореализации. Этот длительный процесс согласования внутриличностных и социально-профессиональных потребностей не завершается профессиональной подготовкой по избранной специальности, он происходит на протяжении всего жизненного и трудового пути. Профессиональное самоопределение направляет выбор карьеры, сферы приложения и саморазвития индивидуальных возможностей, а также формирование практического, действенного отношения личности к социокультурным и профессионально-производственным условиям ее общественно-полезного бытия и саморазвития.

Обусловленность профессионального самоопределения личности подростка социальными нормами и ценностями превращается в серьезную социально-педагогическую проблему. Она требует своего научного и практического разрешения на современном уровне с учетом разнообразных факторов (политические преобразования в стране, трансформация ценностно-нормативной системы, новая социальная дифференциация в обществе, изменение шкалы престижности профессий, снижение уровня жизни большинства населения, рост безработицы, усиление неравенства в сфере образования и т.д.).

В педагогике и психологии исследование проблем профессионального самоопределения проводилось по разным направлениям. Указанная проблема решалась в связи с анализом жизненного самоопределения (Б. Г. Ананьев), в контексте изучения возрастных закономерностей формирования личности (Л. И. Божович) и проблемы формирования человека как субъекта профессиональной деятельности (Е. А. Климов), в рамках изучения вопросов профессионального становления (П. А. Шавир) и психологических основ трудового воспитания школьников (Ф. И. Иващенко) и т.п. При этом профессиональное самоопределение понимается как сложный процесс принятия решений, посредством которых индивид формирует и оптимизирует баланс своих предпочтений и склонностей, с одной стороны, и потребностей существующей системы общественного разделения труда – с другой.

Значительный вклад в исследование проблем профессионального самоопределения внесли ученые Казахстана (Г. А. Уманов, А. П. Сейтешев и другие). В этих работах профессиональное самоопределение рассматривается не как единичный акт выбора профессии, а как длительный процесс развития личности в рамках будущей профессиональной деятельности, составная часть развития человека. Указывается, что успешность профессионального самоопределения зависит, в первую очередь, от сформированности внутренней активности учащегося. Поэтому возникает необходимость в поисках действенных средств активизации позиции школьников в подготовке к профессиональному самоопределению.

Немало исследователей рассматривают проблемы профессионального самоопределения школьников в тесной взаимосвязи с такими вопросами, как:
- организация работы по профессиональной ориентации школьников;
- готовность личности к выбору конкретной профессиональной деятельности;

- политехническое образование школьников;
- подготовка школьников к трудовой деятельности;
- трудовое и производственное обучение школьников;
- готовность школьников к сознательному выбору профессии;
- нравственная готовность школьника к труду и т.д.

Указанные исследования по проблемам профессионального самоопределения личности позволяют выделить объективно существующие социально-педагогические противоречия, которые препятствуют успешному самоопределению современного школьника. В числе подобных препятствий следует указать противоречия между:

- объективной потребностью казахстанского общества в формировании конкурентоспособного, грамотного, мобильного специалиста, обладающего высокими личностными качествами гражданина, семьянина, труженика и отсутствием системности в существующей технологии профессиональной педагогической деятельности по профессиональному самоопределению школьников;

- потребностями педагогической науки в обеспечении социо-нормативной основы процесса профессионального самоопределения личности и недостаточной разработанностью теории профессионального самоопределения школьников;

- потребностями педагогической практики в осуществлении и регулировании процесса профессионального самоопределения школьников и отсутствием методологических, теоретических и практических разработок по этой проблеме;

- потенциальными возможностями общеобразовательной школы и отсутствием слаженной, функционально-организованной системы педагогической деятельности по профессиональному самоопределению школьников;

- возрастными психологическими и социально-личностными характеристиками современных школьников и их учетом в процессе профессионального самоопределения в условиях общеобразовательной школы.

Искоренение подобных противоречий требует проведения целого цикла глубоких исследований проблем, которые в той или иной степени оказывают влияние на процесс самоопределения (в том числе и профессионального самоопределения) личности. Поэтому, несмотря на наличие довольно большого объема трудов по данной проблеме, она остается актуальной как в теоретическом, так и в практическом ракурсах.

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Part 5

Learning and Teaching Styles

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LEARNING STYLES AND DISCIPLINARY FIELDS: IS THERE A RELATIONSHIP?

Abstract

Having knowledge about students' learning styles allows the teachers to improve their expertise in order to supply suitable support and challenge in learning environments. This paper presents the initial results of a research project that aims at investigating the relationship between university students' learning styles and disciplinary fields. This study is being conducted at the University of Aveiro, in Portugal. The Learning Styles Inventory was administered to a sample of 186 students from different academic backgrounds. The overall results do not confirm the association, previously established by Kolb, between learning styles and disciplines. Actually, almost all students possess the accommodating style as dominant. Implications of these findings are discussed and topics for further research are proposed.

Introduction

Given the diversity of nowadays student population, being aware and understanding student differences in the classroom is of crucial importance. At this point we are investigating the learning styles of university students following different degree programs, in order to conceive and implement diverse teaching and learning strategies according to students' learning styles and disciplinary fields. This does not mean that our intention is to accommodate students' learning styles by moulding teaching strategies to students' preferences. Actually, we contend that this aspect is as important as the intentional mismatch between learners' styles and teaching activities, in order to optimise students' abilities.

The research reported here analyses the learning styles of university students in different disciplinary fields. The sample includes 186 Portuguese students from education, languages, biology, biochemistry, biotechnology and multimedia. Students filled the Kolb's Learning Style Inventory (1999). This study aimed at investigating the relationship between students' learning styles and their disciplinary fields. Having in mind the relationships previously reported by Kolb (1981, 1984) the findings were discussed.

Thus, the main aims of this study are as follows: (i) to identify and characterise Kolb's learning styles of students from different disciplinary fields, and (ii) to investigate the association between Kolb's learning styles and disciplines.

Literature review

Kolb's experiential learning theory and learning styles

Kolb's theory is called 'experiential learning' to emphasize the central role that experience plays in the learning process. It is based on the notion that understanding is not an inflexible element of thought but is formed and re-formed through experience.

According to the ELT, learning is cyclical and requires four kinds of abilities: concrete experience (CE), reflective observation (RO), abstract conceptualisation (AC) and active experimentation (AE). Immediate or concrete experiences are the basis for observations and reflections. These reflections are assimilated and distilled into abstract concepts from which new implications for action can be drawn. These implications can be actively tested and serve as guides in creating new experiences (Kolb, 1984). The cycle may be initiated at any point, but the stages are then thought to be followed in sequence.

There are two primary axes that lie behind the cycle: an 'abstract-concrete' dimension and an 'active-reflective' dimension. The ways students perceive or grasp experience ranges from immersing themselves in the experience using their senses, feelings and knowledge in a concrete way (CE), to thinking abstractly about matters, using logic and reason (AC). Having perceived the experience, students need then to understand it through transforming it. Here individuals differ in their preference for doing so, either through active experimentation (AE) or by watching and reflective observation (RO) (Fielding, 1994; Kolb & Kolb, 2005; Yeganeh & Kolb, 2009).

Based on the learners' preferences on the two dimensions – 'abstract-concrete' and 'active-reflective' – Kolb's identifies four learning styles with specific characteristics: accommodating, diverging, assimilating and converging. Each learning style presents its own strengths and weaknesses. Whether a learning style is favourable or not depends mainly on the demands of the learning context (Desmedt, 2004).

Accommodators grasp information concretely (CE) and process it through experimentation (AE). They are called accommodators because they easily adapt to new situations and apply knowledge in new ways. The major strengths of this learning style are: problem-solving, using intuition in trial and error situations, trying new experiences, taking risks and adapting to change (Kolb, 1984; Kolb & Kolb, 2005). Accommodators are also known as 'doers' because they feel comfortable in getting involved in experiences and in carrying out plans. According to Kolb (2000), these learners are sometimes perceived as impatient and pushy.

Divergers perceive information through concrete experience (CE) and process it reflectively (RO). These learners are called divergers because they do extremely well at viewing an event from several perspectives and at generating different ideas. They prefer to work in groups, to brainstorm, to imagine implications and to share ideas (Kolb, 1976, 1984). Because of their great sense of creativity these learners are also known as 'creators'.

Assimilators grasp information through abstraction (AC) and process it through reflection (RO). They learn preferentially by watching and thinking. These students are called assimilators because they have the ability to assimilate diverse data and incorporate it into integrated whole, creating easily theoretical models (Kolb, 1981). This is the reason why they are also called as 'planners'. They prefer to learn alone and appreciate traditional lectures (Kolb, 1984).

Convergers perceive information abstractly (AC) and process it through experimentation (AE). They are called convergers because they have the ability to converge rapidly to get to a conclusion (Kolb, 1981). These learners prefer to comprehend an idea from the theoretical point of view without taking into account related examples. The strengths of this learning style are making decisions, defining problems and reasoning deductively. Individuals favouring this style have been nicknamed 'decision makers' due to their ability in applying ideas in a practical way.

Kolb's learning styles and disciplinary differences

Kolb (1981, 1984, 1999) suggests that it is possible to cluster disciplines based on students' predominant learning styles. This author proposes that the relationship between students' learning styles and their academic field results from two processes: *selection* and/or *socialisation*. Selection is the process by which a student chooses an academic discipline consistent with its preferred learning style. While socialisation refers to a student's learning styles being further moulded to suit the learning norms of a disciplinary area once in it. Thus, different academic fields would favour different learning styles.

Kolb (1981, 1984) supports the division of disciplinary fields into a fourfold typology that leads to four quadrants with diverse characteristics. Similarly to learning styles, these disciplinary quadrants are defined according to the amount of concrete vs. abstract and reflective vs. active abilities required in each one: *"In the abstract-reflective quadrant are clustered the natural sciences and mathematics, while the abstract-active quadrant includes the science-based professions, most notably the engineering fields. The concrete-active quadrant encompasses what might be called the social professions, such as education, social work and law. The concrete-reflective quadrant includes the humanities and social sciences"* (Kolb, 1981, p. 243).

The Present Study

This research study investigates the preferred learning styles of Portuguese students. Following prior studies (Erlich, 2009; Desmedt, 2004; Kolb, 1976, 1984), students were selected from diverse disciplinary fields: natural sciences (biology, biochemistry), science-based professions (biotechnology), social professions (education), and humanities (languages and multimedia). Previous studies revealed that learners from specific academic disciplines adopt different learning styles (Kolb, 1984). So, *do Portuguese students possess learning styles matching their academic areas?* More specifically:

- Portuguese learners studying in natural sciences will prefer abstract and reflective learning modes, also known as the assimilating learning style?

- Portuguese learners studying in science-based professions will prefer abstractive and active learning modes, also known as the converging learning style?

- Portuguese learners studying in social professions will prefer concrete and active learning modes, also known as the accommodating learning style?

- Portuguese learners studying in humanities will prefer reflective and concrete learning modes, also known as the diverging learning style?

Methods

Participants

The participants involved in this study were 186 students (128 females, or 68,8%; and 58 males; or 31,2%) at the University of Aveiro, in Portugal. The students' age ranged from 17 to 41 (mean=21 years; SD=3,8).

There were 57 language students (30,6%), 48 biology students (25,8%), 27 students of biotechnology (14,5%), 23 students of multimedia (12,4%), 20 students of biochemistry (10,7%), and 11 students of elementary education (5,9%). Sixty-nine students were freshmen (37,1%), 64 were sophomore (34,4%), 28 were junior (15,1%) and 25 were senior students (13,4%).

Kolb's Learning Style Inventory and procedure

Kolb's LSI is one of the most prominent and extensively disseminated instruments used to determine individual learning preferences. LSI is organised into 12 groups of statements, four statements per group, with one statement in every group corresponding to one of the stages of the learning cycle (feeling, reflecting, thinking and doing). Within each group, students must rank from 4 ("*best describes you*") to 1 ("*least like you*") the four statements according to their own preferences.

Results and discussion

Students' preferred learning style scores were defined by calculating individuals four scales scores (CE, RO, AC and AE), and two combined scores (AC-CE and AE-RO) as suggested by Kolb (1999). Then, the population average of these two dimensions were calculated and used as the cut-off point on the learning style graph. Katz (1988) suggests these adjustments to the x-axis (AE-RO) and y-axis (AC-CE) as a means of balance out cultural bias for one orientation over another. After adjusting the intersection point to the Portuguese sample, students' learning styles were determined by plotting learners' combined scores along the two dimensions of the graph.

The dominant learning style of each academic discipline was determined by taking the students' individual scores, belonging to the same disciplinary field, and then calculating the mean and standard deviation scores. Afterwards, these data were used to determine the AC-CE and AE-RO scores. These group learning style scores were then plotted along the Kolb's grid.

In general, students from different backgrounds (languages, multimedia, biology, biochemistry and biotechnology) do not seem to possess different learning styles. Since the sample of education students is smaller, it is not possible to determine which learning style is dominant, or even if there is a dominant learning style. So, we have calculated the means of the composite values (AC-CE and AE-

RO) of the six disciplines, in order to allow a better comparison between the dominant learning styles of the different disciplinary fields.

Even if the position of each discipline is placed in a different spot in the grid, mean values of AC-CE and AE-RO plotted in Kolb's grid point out that individuals studying biotechnology, multimedia, biochemistry, biology and languages typically possess an assimilator learning style. This learning style reflects a preference for concreteness over abstraction and a preference for action over reflection.

Education students do not have a predominant learning style. These students show a preference for the accommodating and diverging learning styles. Students with this kind of learning preferences are also known as "*northerners*" (Abbey, Hunt & Weiser, 1985, p. 485). It is possible to state that these students use concrete experience as their preferred learning mode to perceive information. However, they do not possess a dominant learning mode to process information.

According to Kolb's distribution of disciplines: language and multimedia students should possess a diverging learning style; biology and biochemistry students should be assimilators; biotechnology students should prefer a converging learning style; and elementary education should be accommodators. However, none of these relationships between learning styles and disciplinary fields was found in our sample. Actually, all disciplines (except education) revealed a preference for the accommodating style. In our sample, the majority are 1st and 2nd year students (n=133; 71,5%), so maybe these students are not sufficiently embedded in the spirit of their discipline yet. Consequently, they may still not have a learning style matching their academic field. Probably this will be achieved later, along their academic life.

Conclusions, limitations and further research

This research study did not allow us to confirm the associations between disciplines and learning styles found by Kolb (1981, 1984). Education students in this study do not possess a dominant learning style. These students showed to have what Abbey et al. (1985, p. 486) named a "*three-mode pattern*", where one of the learning modes is underdeveloped. In this case, it was abstract conceptualisation that summed a weak score. According to Kolb (1984) it was expected that these students had an accommodating dominant style.

All the other disciplines were associated to an accommodating learning style. However, as reported by Kolb: language and multimedia students should possess a diverging learning style; biology and biochemistry students should be assimilators; and biotechnology students should prefer a converging learning style.

Yet, even if all multimedia, languages, biology, biochemistry and biotechnology possess the same learning style, we can advance that these students hold different 'degrees' of accommodating style. For instance, biotechnology students have a stronger accommodative style than biology students.

This study has several limitations, one of them related to the sample size. One of our aims is to conduct a similar study with a larger sample (more students from each discipline and, if possible, include students from other disciplines and from other Portuguese universities) to confirm (or not) and expand the results obtained in this study. We also would like to analyse the effect of gender, age and year of study on learning style. In what concerns age and year of study, we believe that a longitudinal

study would be the most adequate. Furthermore, we also would like to investigate the influence of culture on Portuguese students' learning styles.

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ICT COMPETENCES FOR TEACHERS IN 21ST CENTURY – A DESIGN FRAMEWORK FOR SCIENCE PRIMARY TEACHER EDUCATION COURSES

Abstract

One of the challenges higher education institutions face is to effectively endow science primary teachers with competences on "how", "where", "when" and "whether" to use technological resources (software and hardware) in teaching contexts. Teachers' Technological Pedagogical Content Knowledge (TPCK) requires knowing about how to represent subject matter (i.e. sciences) with technology from a socio-constructivist approach. A qualitative methodology following a design-based-approach is adopted in this study with the intention to develop a design framework of technology enhanced science education for the professional development of primary teachers. The study identifies strategies for TPCK development of science primary teachers, particularly in higher education (under and postgraduation courses). The paper presents some of the results of the study, which suggest that the combination of problem-based approaches (pedagogy) with research-based technological resources (technology) could be a way to develop innovative science lessons for pupils.

Keywords: science education, teacher education, teaching and learning of sciences, technological pedagogical content knowledge

Introduction

Primary science aims to develop scientific process skills, foster the acquisition of science and technological concepts, and develop particular attitudes in children. The integration of technological resources in primary sciences could facilitate the promotion of pupils' active participation in inquiry activities (Warwick, Wilson & Winterbottom, 2006). Consequently, primary teachers should understand the representation of science concepts using technologies, as well as pedagogical strategies that use ICT in order to improve pupils' learning (Murphy, 2003; Warwick, et al., 2006).

Technological and pedagogical content knowledge (TPCK) should be the basis of effective teaching with technology. TPCK refers to the knowledge required by primary teachers to integrate technological resources in their teaching area (i.e. sciences) (Koehler & Mishra, 2009). Primary teachers should understand the representation of science concepts using technologies, as well as pedagogical strategies that use ICT in order to improve pupils' learning (Graham et al., 2010). Science teachers' TPCK requires knowing about how to represent subject matter (sciences) with technology from a socio-constructivist approach (Jimoyiannis, 2010a, 2010b). TPCK represents the articulation between pedagogical content knowledge (PCK), technological pedagogical knowledge (TPK) and technological content knowledge (TCK) of (science) teachers (Ferdig, 2006; Jimoyiannis, 2010b; Koehler & Mishra, 2009).

However, the use of technological resources by science (primary) teachers in teaching contexts has been irregular. The constraints are: the nature of the science curriculum, which does not include the potentialities of ICT; the lack of technological resources available in schools; and teachers' technophobic attitudes (Juuti, Lavonen, Aksela & Meisalo, 2009; Moreira, Loureiro & Marques, 2005). In this context, it is vital to conduct research in order to identify how this more integrated approach supports the development of TPCK in science primary teachers. In order to contribute towards the development of Teachers' PCK, Alarcão (1994) suggests the development of synergies in the three dimensions of the curricular areas related with "Teaching Methodologies": research (that studies the problems related to the teaching and learning process of different subjects); professional (related to the teachers in action) and curricular (related to the formative dimension of Teaching Methodologies in teacher education courses). Based on this perspective, it is vital to improve the articulation between Learning/Technology/Interaction in teacher education courses (Moreira & Loureiro, 2008). This articulation can improve the relationships between students and teacher-trainers, and between them and the learning content and the technological resources, so as to achieve improved students' learning outcomes.

Research methodology

A design-based research (DBR) approach was adopted in order to identify which "guidelines" might contribute towards the development of science primary teachers' TPCK in a science teaching context and how these guidelines should be integrated in the design of a science teacher education course (initial and in-service). DBR projects could offer new educational knowledge to act (teach, learn, and design educational innovations) more intelligently.

The features of a DBR approach are: designing is an iterative process; designing generates an artefact that is applicable to a wider audience than just the correspondence group; and designing renders novel educational knowledge about science teaching and learning. The artefact could be a technological resource, a teacher guide or a synopsis of a teaching sequence (Andriessen, 2007; Collective, 2003; Juuti & Lavonen, 2006).

In this study, the artefact is a framework with "guidelines" that could contribute towards the development of teachers' TPCK in science teaching contexts. The study was divided in two phases:

- **First phase**: aims to understand how to promote science primary teachers' understanding of the multiple technological resources available, and how those technological resources can be used to enhance a wide variety of sciences teaching activities. This phase has two data collection tasks:
- *First task* (January 2009 to October 2009): 20 curriculum plans related to Educational Technology (ET) (i.e. "ICT in education") were analysed from an exploratory point of view. Data were obtained from "Basic Education" degrees (1st Bologna cycle), offered by Portuguese public higher education institutions (7 universities and 13 polytechnic schools).
- *Second task* (November 2009): 4 National educational technology researchers were interviewed. The researchers were specialized in the development of teacher education courses (undergraduate and postgraduate

degrees) (ReA, ReB, ReC) and one of them was also an expert in science education research (ReD). The semi-structured interview had predefined open questions, but the interviewer used further questions during the interaction with the researchers.

- **Second phase**: aims to develop, implement and evaluate the effectiveness and mid-term impact of the in-service science teacher education course in TPCK development. This phase has two data collection tasks:
- *First task* (December 2009 to July 2010): participant observation performed by the researcher during the development and implementation of the in-service Science Primary Teacher Education Course.
- Optimal guidelines that emerged from the first phase were put into practice in the curricular areas of "Sciences Teaching Methodologies" and "ICT in Science Education" of the University of Aveiro Master's degree in Science Education (2nd Bologna cycle) in Portugal. This Master's degree was specifically designed for in-service science primary teachers who want to develop/improve their professional knowledge related to science teaching and learning practices.
- The participants in this phase were the researcher, two teacher-trainers and nine in-service science primary teachers. Teacher-trainers were asked to participate in this project, based on their formative and research interests, as well as the interest of the development of TPCK of in-service science teachers of the Master's degree in Science Education.
- *Second task* (July 2010 to May 2011): data was collected through interviews performed by the researcher of this study to nine in-service science teachers and two teacher-trainers of those curricular areas, who participated in the project. Specifically, it was important to assess if the strategies and technology-rich activities adopted in the curricular areas of "Sciences Teaching Methodologies" and "ICT in Science Education" developed and/or improved in-service science primary teachers' TPCK, particularly: to reflect about their own professional practices; incorporate research outcomes in their sciences teaching and learning activities; expand pedagogical innovations in the classroom within the educational community.

A content analysis approach was adopted in order: to identify the technological resources that could be articulated with the sciences teaching and learning process (TCK); to understand which ICT competences should be developed in science primary teacher education courses (under and post graduation degrees) (TPK); to define teaching and learning strategies that could be adopted to develop and assess students' learning (PCK).

Results and Discussion

These results show that there are three critical elements for the development of science teachers' TPCK: 1) knowledge of science; 2) knowledge of science pedagogy; 3) knowledge of technology. Therefore, it is essential to develop synergies in the three dimensions of Teaching Methodologies: research, professional and curricular. At the research level, science primary teachers should be asked to conduct research projects about educational problems related to sciences teaching and/or learning processes. At the professional level, curricular areas of "Sciences

Teaching Methodologies" and "ICT in Science Education" should be articulated with professional practices of the in-service science primary teachers. At the curricular level, the formative dimension of teaching perspectives should allow developing TPCK in science (i.e. combining science, technology and societal subjects (content), with inquiry learning and problem-based learning methods (pedagogy) with research-based technological resources (technology). For instance, in-service science primary teachers explore how Web 2.0 tools can be used to enhance a wide variety of activities in science teaching and learning including:

- Ning: enhancing social networking between in-service science primary teachers and their teacher-trainees (e.g., ticedidacticadasciencias.ning.com);
- Box.net: enabling the sharing of videos, audio/podcasts and scientific literature about research studies that endorse the integration of ICT-based research tools in science teaching and learning, etc. (e.g., www.box.net);
- MindMeister: enhancing collaborative mind-mapping in order to understand the representation of scientific and technological concepts using technologies (e.g., www.mindmeister.com/pt);
- WordPress: blogging tool that enables the development of digital portfolios to give in-service science primary teachers the opportunity to take on a self-regulating role over their learning process (e.g., wordpress.com).

At the beginning of the course, all in-service science primary teachers lacked confidence with integrating Web 2.0 tools in their science classrooms. However, once they acquired the critical skills in their use, they were able to use the tools innovatively in their classrooms. They were provided with opportunities to implement small research projects in their science classroom contexts (Guerra, 2010). We will present two research projects implemented by two in-service science primary teachers: a senior and a junior professional.

Teacher A – senior professional

Teacher A teaches pupils aged 6 and 7 at a public science school in the north of Portugal. She has 15 years of teaching experience but little digital competence in the integration of Web 2.0 tools in the teaching and learning process. During her involvement in the course (from January to July 2010) she explored two innovative and emerging technological tools in authentic science teaching and learning contexts: the WordPress blog 'Cientistas de palmo e meio' (Junior Scientists) – available at cientistasdepalmoemeio.wordpress.com, and the online mind mapping and brainstorming tool, *MindMeister*. She aimed to develop her pupils' ability to find and select information about current scientific and technological issues. The activities she designed have a science, technology and society orientation with the long-term aim of developing pupils' scientific literacy. The blog was used to: involve the pupils' parents in the teaching process, so that they could participate in their learning development; improve pupils' digital competencies (i.e. effective communication); disseminate pupils' work within and outside the classroom, including sharing and collaborating with other schools. The teacher chose the MindMeister tool to enable pupils to represent science concepts. Although this teacher was initially very reluctant to use Web 2.0 tools, since attending the course not only did she carry out the research, but also started collaborating with another

science teacher in a blog called Inquisitive Kids, available at pequenoscuriosos.
wordpress.com.

Teacher B – junior professional

Teacher B has less than two years of teaching experience. She teaches pupils aged 6 to 10 and is doing a PhD in Education at the University of Aveiro. While attending the doctoral program she designed a technology-based science activity and explored a Web 2.0 tool that allowed sharing online photos using Flickr (www.flickr.com/photos/projectolandscape). Her aims were to develop pupils' understanding about science and technology aspects of the landscape of Aveiro. Pupils took photographs of the city of Aveiro and analysed the role of physical and natural landscapes using the photographic evidence. The photographs were placed by the pupils on the Flickr platform, which served, simultaneously, as storage for photographs and for promoting analysis, discussion and reflection by pupils about environmental aspects of Aveiro, such as the water quality of its lagoon.

Conclusions

The study identifies strategies for TPCK development of science teachers, particularly in higher education courses. In these contexts, curricular areas should be designed drawing attention to three main aspects: 1) TPK, TCK and PCK are key elements for developing science teachers' TPCK in science; 2) All curricular areas of science teacher education courses (1st, 2nd and 3rd Bologna Cycles) should contribute for science teachers' TPCK development; 3) The curricular area of teaching methodologies (i.e. didactics of sciences) has a crucial role in the science teachers' TPCK in science development.

A framework for science teacher education courses should enhance the synergies between research, professional and curricular dimensions. At the research level, science primary teachers should be asked to conduct research projects about educational problems related to sciences teaching and learning processes. At the professional level, curricular subjects should be articulated with professional practices of the science teachers. At the curricular level, the formative dimension of sciences teaching perspectives should allow to combine STS subjects (content) with inquiry learning and problem-based learning methods (pedagogy) and with research-based technological resources (technology). The results of this later stage of the study will be the object of future writings.

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TEACHER EDUCATION IN THE CONTEXT OF INTERNATIONAL COOPERATION: THE CASE OF EAST TIMOR

Abstract

East Timor has reached independence in 2002, after two periods of colonialism and after severe violence, especially following 1999. As a result, the country was almost destroyed, and lost its qualified workforce in all sectors, including education. To ensure national independence it is necessary to reconstruct and build the basic infrastructures for all sectors, and mainly, prepare a technical and professional elite expected to ensure the autonomy of the society and the sovereignty of the state. In this context, education plays a key role. Thus, the Timorese Government has supported several approaches to empower national education, mainly through teacher education. Due to the lack of qualified teacher trainers, East Timor has resorted to the support of teachers from Portuguese-speaking countries, such as Portugal. In this paper we describe and discuss how a module of a bachelor's course carried out in East Timor was designed and implemented by Portuguese teachers. Furthermore, we reflect upon the singularities of such an experience, highlighting the challenges and the obstacles found by the trainers and the trainees.

Contextualisation: the path to independence and its consequences on education

East Timor is currently the world's newest nation. It became, for the first time, an independent country on May 20, 2002. This followed 450 years of Portuguese colonial administration, 24 years of illegal occupation by Indonesia, and 32 months of temporary international administration by the United Nations Transitional Administration of East Timor. Transformation of the educational legacy of the Portuguese and Indonesian occupation periods is a vital factor of building an independent and economically, culturally and politically sustainable future for East Timor.

East Timor is one of the world's least developed countries. In terms of the United Nations Development Programme (UNDP) Human Development Index (0.495 for East Timor in 2011) it was ranked 147 out of 187 countries worldwide in 2011 (UNDP, 2011). In 2011, GNI (Gross National Income) per capita was estimated to be US\$ 3005 (UNDP, 2011) and in 2007, approximately 37% of the total population lived with less than US\$ 1.25 per day. In 2011, infant mortality was 56 deaths per 1000 live births (UNDP, 2011), and data from 2008 indicated that 370 women died for every 10,000 live births.

Data from the Preliminary Report on the 2010 Census indicates that East Timor's population is about 1.2 million. Approximately 41 percent of the country's population is living in poverty. However, it is important to emphasise that in the last 5 years, East Timor has made considerable progress in improving its people's livelihoods, alleviating poverty and improving social conditions (UNDP, 2011). Much of these improvements are based on the way in which the revenue from the

Petroleum Fund is being used to promote human progress through the development of the non-oil economy.

As stated by Timorese during the course of the 2001 participatory assessments for the National Development Plan, the link between educational attainment and poverty reduction was recognized. The Timor-Leste Survey of Living Standards showed that, in 2007, educational attainment remained low. A substantial percentage of the population (57 percent) remained uneducated to the primary level. Only 14 percent of the population had education to the secondary level. Furthermore, the 2002 East Timor UNDP report states that tertiary education sector is diminutive, with only 2.8% of adults enrolled.

This low level of development was intensified by a period of violent retribution perpetrated by the Indonesian military and militia groups after a UN sponsored referendum on August 30, 1999. The country was in ruins and lost almost its entire qualified workforce in all sectors, especially in education, caused by the wave of violence before and after the referendum (Robinson, 2009). Moreover, this period of violence is thought to have destroyed about 80% to 90% of school buildings and other infrastructures (UNDP, 2002).

This situation has obviously become an enormous challenge for the newborn country, lacking experience and resources. The Timorese Government has invested on fundamental aspects of the education sector, such as i) reconstruction and construction of educational infrastructures, ii) reinforcement of the institutional capacity, iii) improvement of the educational system (both in curriculum development and in the recruitment and training of skilled teachers) (Jerónimo, 2011).

Nowadays, East Timor's education system is still the legacy of colonial rule, but by two colonial powers that had very divergent concerns (Shah, 2012). For most of their period of rule the Portuguese showed a slight interest in mass education. The Indonesian approach to education was quite different. The Indonesian government was determined to achieve universal primary education. According to the 2002 UNDP report, around 1985 almost every village had a primary school. However, such an increase in the number of schools was not followed by the quality of teaching. Furthermore, Indonesia used teaching as a strategy of 'Indonesianisation' of population. The government forbade the use of Portuguese (the language used in East Timor during the Portuguese period, as well as Tetum and other dialects) in schools and implemented Indonesian language as the official language of East Timor. Since the independence, the official languages of the country are Portuguese and Tetum. Presently this also constitutes a serious issue, since teachers are expected to teach in Portuguese, and most of them do not manage this language.

After the independence there was a lack of teachers, and a large number was recruited on a voluntary basis. Most of these teachers were not qualified (a large number hold only primary education) (UNDP, 2002). In 2007, 75 percent of East Timor's 12.000 teachers were not qualified to teach, under the standards defined in the country's National Education Act and by the Ministry of Education. Consequently, in 2008 the Government provided intensive training for 3.000 teachers. In 2009, this programme was extended to cover 9.000 teachers. In addition, 617 teachers have completed undergraduate programmes and 36 teachers were attending postgraduate programmes. These intensive training programmes are now

mandatory for all teachers and are an ongoing initiative (East Timor Government, 2010).

The lack of qualified trainers led the rulers to strengthen ties of cooperation with international organizations and with several countries, including Portugal and Brazil (both Portuguese speaking countries). The bond of cooperation between East Timor and these two countries essentially focused on further developing the quality of education through the reintroduction of the Portuguese language courses, the regular intensive courses, the PROFEP-Timor courses and the Bachelor's course (BC) (Jerónimo, 2011). These programs have been conducted over the past years aiming to contribute to the enhancement of the quality of education in East Timor.

In this paper we aim to:

i)   describe the organization of the scientific modules of a BC and also the teaching-learning-assessment strategies that were implemented;

ii) describe the main obstacles/challenges that influenced/determined the conceptualization and implementation of the pedagogical strategies;

iii) highlight some insights that can be useful for further similar initiatives.

Teacher education endowment: the 8th edition of the teacher-training bachelor's degree

In order to obtain competent and trained teachers, the Timorese Government has heavily invested on teacher training, mainly in in-service teacher training. To achieve this goal, the Timorese Ministry of Education has relied on the support of international experienced higher education institutions. The University of Aveiro (Portugal) has been collaborating on the restructure of the secondary education curriculum, developing students' books and the corresponding teachers' books and cooperating on several teacher-training courses and programmes fully taught in Portuguese.

One of such programmes was the 8th edition of the teacher training bachelor's degree, which included several modules. The last one consisted in 300 hours of training of 301 biology, chemistry, mathematics and physics teachers, implemented during November and December 2011 on the National Institute for Teacher Training (INFORDEPE), located in Dili, East Timor.

Regarding the facilities provided for the training programme, the INFORDEPE is housed in a plot of several buildings in the heart of the city of Dili and includes several classrooms; one roughly maintained science laboratory divided by shelves in three areas to accommodate some of the physics, chemistry and biology classes; one library with a severe shortage of books, not to mention the lack of up-to-date and accurate resources; one photocopy centre; one computers room; one auditorium; one canteen and one dormitory for those trainees who are displaced from their home districts. Despite the apparent reasonable facilities, all the rooms provided for the training programme were constrained by non-existent running water, more significant in the science lab, and limited access to electricity, characterized by constant and unexpected run-outs, mainly noticed in the computers room and the science lab.

Despite that all the 301 science trainees had previous teaching experiences, only a few of them were formerly graduated from higher education institutions and, of those, the language of their studies, Tetum or Indonesian, had been different from

the language they should privilege while teachers, Portuguese. The huge diversity of the in-service teachers' educational backgrounds was a common feature to all the four science subjects.

Additionally, the teachers' ages varied from mid-twenties to late-sixties and most of them were temporarily displaced from their home districts to take the course. This meant that they would be fully dedicated to the course during its length. An important aspect to reveal, which is essential to understand these teachers' professional context standpoint is that, despite that they were supposed to teach their students in Portuguese, they did not have access either to books or any other Portuguese written literature. Another critical aspect to take into consideration is that most teachers had not been teaching what they intended to graduate on after taking this course. They were given the chance to choose the science subject they intended to graduate on. Despite that some tried to deepen their knowledge on the area they used to work and took the course on their own subject, others (most of them) tactically opted to study the subject which was having a shortage of teachers on their home districts. Thus, it was not unusual to find situations as unlikely as a primary school teacher graduating on maths or a geography teacher graduating on physics.

To accomplish this programme a team of 10 qualified teacher trainers from University of Aveiro (3 biology, 1 chemistry, 4 mathematics and 2 physics) were assembled.

Timorese trainees were divided into subject areas and latter subdivided into smaller groups, depending upon the number of assembled trainers. Such an arrangement resulted in 10 classes of varied length, 4 math's classes of nearly thirty teachers per class, 3 biology classes of approximately forty teachers per class, 2 physics classes each composed of 15 trainees and 1 chemistry class with ten teachers.

Organization and implementation of the scientific modules

Covered contents

The contents covered during the course included topics that are taught at pre-secondary level from 7th to 9th grade. Some of these topics were:

Mathematics: types of numbers (e.g., natural, whole, integers), first and second degree equations, statistics, elementary geometry (planes and solids) and trigonometry;

Biology: anatomy and physiology of the Human body (e.g., urinary system; reproductive system); dynamic of ecosystems; levels and organization of biodiversity;

Physics: measures, measurement and measuring instruments; circular motions, Newton's laws; slants and pulleys, types of energy and energy systems; electricity and electric systems;

Chemistry: corpuscular theory of matter; atomic model, types of aqueous solutions, properties of the matter, chemistry and sustainable development, elements of the periodic table.

Time schedule

Concerning the classes' schedule, it was agreed between the trainers and INFORDEPE that the daily training schedule would follow a work routine of 8

hours, split up into 5 hours of morning classes sessions and 3 hours of supervised autonomous work in the afternoon to consolidate and extend the work carried out in class. Time spent on the writing of a monograph about a particular topic related to the scientific domain chosen by the trainee, was also integrated in the autonomous work time. Once a week, the afternoon work of each class was substituted by biology, chemistry or physics practical lab activity or a guided mathematics practice session.

Teaching-Learning Strategies

Special attention was given to the design and implementation of the classroom strategies, which was the trainers' responsibility. The following aspects were considered:

a)   the two folded teaching goal of the bachelor's course in improving teachers' scientific knowledge, as well as exploring innovative teaching-learning-assessment strategies, in order to develop pedagogical content knowledge;

b)   the diversity of constraints that had to be dealt with during the bachelor's module and which were previously mentioned (such as the heterogeneity of the trainees, lack of pedagogical resources, high miscommunication risk due to language difficulties), but also due to the risk of 'educational culture shock' between trainees and trainers. In Timorese primary, pre-secondary and secondary schools, transmissive teaching strategies, such as reading, repeating and copying promoting memorization, seems to be the rule (Earnest, 2003). Actually, despite the great disparity of the teachers' training and educational background, all of them revealed a remarkable capacity for memorization;

c)   the consciousness of the vast constraints the Timorese teachers have to deal within their daily professional life. These difficulties will not miraculously vanish after accomplishing the bachelor's module. Implemented pedagogical strategies should not be over sophisticated and decontextualized from the economical and social context of East Timor.

It was decided to start each 'thematic block' with the introduction, exploration and definition of the main concepts. Strategies such as oriented reading and interpretation of simple texts, registering the main terms and concepts on the board were widely used. Gradually more cognitive demanding tasks were introduced by the resolution of specific exercises. In specific occasions, trainees were asked to elaborate concept maps, or formulate 'wonderment questions' (Chin & Brown, 2002). Problems were solved individually or in groups. PowerPoint presentations were deliberately used in a few specific moments, since access to ICT resources is very difficult in the majority of East Timor schools.

At the end of each specific thematic block, the pedagogical aims of the Bachelor's course were worked. The teachers reflected and worked collaboratively on topics such as: i) definition of learning outcomes and goals for specific scientific contents; ii) long and midterm class plans considering scientific contents and learning outcomes; iii) daily plans, in order to conceptualize and organize diverse teaching-learning-assessment strategies; iv) definition of global and specific correction criteria to be taken into account in the elaboration of a test. Point distribution throughout the test was also exercised.

In what concerns laboratory classes, the activities developed were more practical and demonstrative than experimental, mainly due to the lack of well-

maintained laboratory material, but also because of the high number of trainees per class. However, despite these difficulties, simple activities were designed in order to give the teachers the opportunity to experience and manipulate lab material, in some cases for the first time (Earnest, 2003). Furthermore, as most Timorese schools do not have science labs, nor any lab equipment or reactants, an effort was made to (whenever possible) give the teacher-trainees alternative materials of their daily use to be applied when making experiments with their own students. Some activities were:

Biology: microscope observations (e.g., blood cells, plant cells); study of influence of light and water on the germination of different seeds;

Physics: determination of the coefficient of friction between two surfaces (by using slants and pulleys); construction of solar oven cookers;

Chemistry: separation processes of the components of heterogeneous or homogenous mixtures; simple solubility experiments; appraisal of the density of solid and liquid materials; acid-base reactions; oxidation-reduction reactions.

Since many of the teacher-trainees had never written a laboratory activities report, classes were also used to explore the structure of a scientific report.

Assessment

On what concerns trainee teachers' evaluation, formative assessment methods were privileged in order to maximize learning opportunities. Qualitative description and compilation of the most common mistakes were used to boost teacher reflection.

Final thoughts

All the trainers emphasize the engagement of the Timorese teachers and their will to maximize this unique learning opportunity. Being conscious of the crucial role they will have in the future education of the country, the trainees revealed a huge motivation. Timorese teachers also demonstrated awareness of their own limitations and difficulties, therefore showing solidarity among each other. Due to the teaching methods usually used in East Timor that overvalue memorization and passive acquisition of knowledge, the trainers identified some underdeveloped competencies, which should be strengthened: graphs and tables' interpretation, establishing relationships between concepts, applying knowledge in new contexts, and abstract reasoning. Science education in East Timor relies mainly in a theoretical perspective, lacking the experimental approach. Therefore, it was not unexpected to see that most teachers had never experienced a science lab opportunity.

Even if the social, professional and economical contexts were not perfect, the teachers excelled the trainers' highest expectations. There remains a real hunger for education within East Timor.

Acknowledgments

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HOW WOULD VIRTUAL LEARNING ENVIRONMENT (VLE) ENHANCE ASSESSMENT FOR LEARNING MATHEMATICS BY THE SPECIAL EDUCATION NEEDS STUDENTS (SENS) IN SECONDARY EDUCATION SECTOR

Abstract

This paper is a pilot study that investigates how the use of virtual learning environment can enhance or support assessment *for* learning mathematics by the KS4 students with special education needs in school sector, and then reports the finding. A virtual learning environment is an electronic system that can provide online interaction of various kinds that can take place between learners and tutors, including online learning and assessment (JISC, 2003). It is a learning platform that supports teaching and learning programmes, such as AfL (assessment for learning). The platform also encourages personalised and collaborative learning, enabling students to carry out peer and self assessment. The finding suggests that VLE enhances assessment for Learning by offering instant feedback and feed-forward to SEN students who thus take responsibility for their own learning, and have also been motivated to correct their work. Furthermore, evidence of teacher – student interactivity which facilitates greater understanding of mathematical concepts is highlighted by the study.

Keywords: Virtual Learning Environment (VLE), Assessment for learning, Teaching methods, Mathematics, Key Stage 4, Secondary education sector, Fronter

Introduction

The way academic practices in higher, further and school sector education responds to the influence of computer networks and technology is central to immediate and future role of educators in creating a viable teaching and learning environment. Fuller and Soderlund (2002) argue that the process of legitimising knowledge (Justification) is a social process, and whereas knowledge is related to social action, information is conceived as a flow of messages enabling the creation of knowledge. The driver of academic practices through virtual learning is that of the creation of one's own knowledge which amplifies the process of creating meta-conceptual understanding. Today, technology resources are vital to creating an environment that is interactive and personalised. Web-based information systems including online data resources have continued to be more prevalent in our educational activities. Greenwood (2010) states that students, teachers and school administrators face the growing challenge of accessing data from a variety of sources. He further suggests that it is now a common place to find a multitude of WebCT-based systems in a typical school, college or academy environment that teachers and students are required to use as part of their daily routine (Greenwood, 2010). In 2008 schools in England were encouraged to embrace the use of virtual learning environment in preparation, teaching and delivering of lessons to learners

(Becta, 2008). For this reason, all schools have adopted the use of the VLEs in teaching, learning and assessment. A VLE has many benefits and functions that would support students' progression in their courses, particularly the special educational needs students in areas such as out-of schools learning, personalised, immediate in-class and out of school assessment, (Becta, 2007). A virtual learning environment is a set of teaching and learning tools designed to enhance a student's learning experience by including computers and the internet in the learning process. A VLE provides components in which learners and tutors participate in several on-line interactions, including on-line learning (Silva, Costa, Rogerson, and Prior, 2007). The principal components of a VLE package include curriculum mapping (breaking curriculum into sections that can be assigned and assessed), student tracking, online support for both teacher and student, electronic communication (e-mail, threaded discussions, chat, Web publishing), and internet links to outside curriculum resources (TechTarget, 2009). The VLEs offer the ability to schedule a range of learning activities and make tools available rather than just manage content (Sclater, 2009). Users are able to explore social situations and "try out" different behaviour responses for a variety of simulated social interactions (Kerr, Neale, and Cobb, 2002). A numbers of VLE software packages are available including Blackboard, Fronter, WebCT, Lotus Learning Space, Moodle and COSE. The virtual learning environment which serves as supportive tool in education can enable appropriate modification in curriculum, teaching methods, personalised assessment, educational resource, medium of communication or the learning environment, thereby catering for individual differences in learning (Ministry of Education, 2009). Williams, Jamali and Nicholas (2006) suggest that the VLEs are particularly useful for people with autism and may provide the ideal method for social skills training. Evident from Wilson's study indicates that learners with special needs in mainstream schools are very reluctant to follow a curriculum which they perceive as having little 'surrender value (Wilson, 2006). It is my contention that a VLE will enable such learners to acquire skills necessary for today's job market. For the purpose of this paper, special education needs refer to a range of educational and social services provided by the public school system and other educational institutions to individuals with disabilities who are in their KS4 sessions and between 14–16 years of age.

Design and Methodology Approach

A group of twenty special education needs students (SENs) students at KS4 level were used in creating a case study approach in this study, enabling me to scale down the sample size to a manageable number of students. Hopkins (2002) suggests that one of the advantages of a case study is its relative importance in plotting a group's reaction to learning and teaching. The case study is an ideal research strategy when holistic, in-depth investigation is needed, allowing for a mixed methods approach in data gathering, bearing in mind the focus of the investigation which is; how would virtual learning environment (VLE) enhance and support Assessment *for* Learning in mathematics for KS4 students with special educational needs.

Designing the Direct Observation

A small focus group of the special education needs students with various disabilities were used to create a case study approach. Interview, questionnaire(s) and observation tool(s) were used in the study; this enabled me to verify techniques and to ensure they were suitable. In order to gain more insight into the impact and characteristics of virtual learning environment in the 'Assessment *for* learning', I addressed both quantitative and qualitative aspects of the virtual learning environment tools used in teaching and learning mathematics in the school. The operationalisation led to a standard observation scheme which includes the curriculum and didactic characteristics (whether or not specific types of virtual learning environment were used in the school for teaching and learning), and include:

a) Degree of curriculum differentiation within KS4;
b) Access to virtual learning environment (number and types of computers, location, computer room);
c) Characteristics of virtual learning environment in use (School version);
d) Difficulties experienced in by the special education needs while using a virtual learning environment in mathematics lesson;
e) Access to a virtual learning environment for support as a teaching resource, enabling assessment *for* learning;
f) Ease of virtual learning environment use, the associated problems and impact on students' assessment for mathematics learning;
g) Student's current situation.

Administering the Observation

The participants were the special education needs students selected from a KS4 class group. This group forms a representative part of school population. Mathematics lessons were taught to these groups over two weeks (10 day) period for one hour per lesson. Each lesson was held in a virtual learning environment room (lab room) with computers set aside for this observational exercise. At the end of the period, a simple test plan was drawn by the teachers, and students answered questions on the virtual learning environment platform. I entered the classroom unannounced and students were asked to fill in the questionnaires accompanying the test plan online. The answers were recorded and observation data was triangulated against the questionnaires and interview data from the teachers. The likert – type items, alpha scale construct was carried out and Cronbach Alpha Coefficients were calculated using Statistical Package for the Social Sciences, otherwise called Predictive Analytics Software (Field, 2005) which shows an acceptable reliability of 0.83 (see Triangulation and Validity below).

Data Management & Analysis

The three phases of data management – data preparation, data identification and manipulation, including data cleaning processes was adopted in this pilot study. For data preparation, the coded survey instruments were entered into the Predictive Analytics Software version 17.0 for analysis. The data identification involves dividing texts into meaningful identifiable sections of information (Yin, 1994). Data

manipulation involves putting the quantitative data through the rigours of analysis that is relevant to my research questions. Data cleaning which is a process of intuition – knowing where and when to stop data collection and validate your existing data for errors i.e. your cut off point during data collection. The process of storing and coding data was made possible through the use of Predictive Analytics Software which generated descriptive statistics (means, standard deviations, frequencies, percentages, minimum, maximum, correlations and reliability indices) for a set of data, enabling comments to be made about frequency. Cross (2010) suggests that analyses using descriptive statistics rely on arbitrary decisions about size and about what constitutes importance. The study made use of Cross tabulation in measuring any significance between items under personal background, and Cronbach Alpha Coefficient was used for instrument reliability. The reliability test enabled opinion on the reliability of items such as teaching and assessment *for* learning as goals, practices, processes and statements of opinion in relation to virtual learning environment.

Triangulation and Validity

Triangulation refers to the use of more than one approach to the investigation of a research question in order to enhance confidence in the ensuing findings. Usually data collected from different sources reveal a range of views from the respondents about phenomenon and to compare what the respondents are saying in order to gain their trust. I employed triangulation technique in order to cross-reference ideas for validity, reliability and objectivity. The mixing of data types known as triangulation is often thought to help in validating the claims that might arise from an initial pilot study (Wendy, 2004). Pavot, Diener, Colvin and Sandvik (1991) in Pallant (2007) report that the reliability and internal consistency, with Cronbach alpha coefficient of 0.85 is good. In the current study, reliability statistics shows the Cronbach alpha coefficient of 0.83; this indicates a very good reliability and internal consistency.

Research Findings

The research highlighted pedagogical, practical and strategic issues in using virtual learning environment platform for learning assessment, especially for the special education needs students at KS4 education sector. (By pedagogical, practical and strategic issues in using virtual learning environment, I mean: (a) interactive mathematics teaching and learning, a measure of assessment *for* learning, learner centred and constructivist in nature; (b) meeting students' needs, teachers needs, time on task, reciprocity and cooperation among the special education needs students, and prompt feedback; and (c) working understanding of virtual learning environment, training and professional development of teachers and technologists). The twenty students who received in-class feedback and feed-forward during mathematics lesson, and via the school version of virtual learning environment (Fronter) seem to move their learning forward and much quicker when compared with students who only received feedback in the class. However, there is evidence of teacher – student interactivity, where students receive immediate feedback during the lesson; this facilitates understanding quicker than giving feedback and feed-forward through the Fronter platform, especially with low ability students. It was also evident that the virtual learning environment motivates all students and supports

assessment for learning, for example, peer and self assessment. The study found that the students were able to use the 'Fronter' platform (school version) to learn, set target and manage their learning. The mathematics teacher was able to create new conversation within the platform and teach to students new lessons for a period of ten days, following, students were assessed. The study suggests that students were able to set their personal goals and carry out self assessment when directed by the teacher. The study confirms that the virtual learning environment – 'Fronter' strongly supports all the elements of curriculum on mathematics entitlement and choice. Students were actively involved in the process of learning and assessment within the Fronter platform, and were enthused at the extent to which they have used the platform as a learning tool which underpins the argument that virtual learning environment contributes to learning and teaching of students. There is evidence from the analysis of data collected via the Fronter that those students who receive constant feedback and guidelines for improvement both in the class and through 'Fronter', performed better than other students who did not. The 'Fronter' offers students in the research group an opportunity to self assess their work in real time to see how they have performed, and possible areas of improvement before finally uploading their work. These students were able to carry out peer assessment by first of all, saving their work in the student folder; this allowed other students to access these work and make comments. As students were given feedback and feed-forward that is relative to their learning ability, personalised access to learning and assessment were achieved. This also promotes independent and interactive learning which in my view raises confidence and engagement level of the learners on their learning process. All the students indicated that they enjoyed using virtual learning environment to carry out peer assessment exercise since it availed them the opportunity to look at other student's work in order to give feedback and gain more understanding. The students confirmed that it was helpful to receive feedback and guidelines on the required work improvement from fellow students, enabling students to carry out peer and self assessments. The result of perceived impact of virtual learning environment on students' learning before and after the observation on 'Fronter' shows that majority of learners testified that their mathematics skills was not very good before using the virtual learning environment in the mathematics class. Their lack of enthusiasm and unable to discover mathematical concepts seem to contribute to lack of skills and de-motivational attitude towards mathematics, leading to under achievement and poor records in mathematics. The instant feedback provided by 'Fronter' after the observation stage was greatly valued by students who used this period to take greater responsibility for personal learning. They also show greater motivation and confidence in their learning and assessment by correcting their works through feedback and feed-forward, discovering patterns, concepts and relationships; thereby building confidence as they express themselves freely through speech and text. Review of literatures seems to suggest that virtual learning environment has added quantities of declarative knowledge and concepts to learning, thus special education learners make more use of pictorial than abstractions (NCTM, 2000; Scott, 2008). The learners are also good at moving images and designing objects within the platform and because they are visual learners, they make use of manipulative within the VLE to engage lerning. Furthermore, the provision of access to assessment data by the students allowed teachers to address

any personal or group misconceptions immediately during the lesson. Finally, achievement on the overall linearity increment on mathematical concepts acquisition amongst learners was achieved; enabling confident building, assessment based problem – solving and knowledge construction skills by the students' group.

Conclusion: The Changing Student Roles in Learning and Assessment

This study reveals that the role of learning and teaching from the perspectives of the special education needs students and the teachers are changing with out us realising this change. The special education needs students who participated in this study were enthused when introduced to the use of virtual learning environment in a mathematics class. They showed great sense of motivation and were able to personalise and move their learning forward. Goodyear (2002) developed a number of indicators that show how the tutor and student roles might be expected to change as teaching, learning and assessment finally move into an online environment; these indicators include:

1. From passive receptacles for hand-me-down knowledge to constructors of their own knowledge;
2. Students move from memorising facts towards solving problems;
3. Students view topics from multiple perspectives;
4. Students devise their own questions and search for their own answers;
5. Students work as group members on more collaborative/co-operative assignments: group interaction significantly increased;
6. Increased multi-cultural awareness;
7. Students work towards fluency with the same tools as professionals in their field;
8. Increased emphasis on students as autonomous, independent, self-motivated managers of their own learning;
9. Discussion of students' work in the classroom and peer to peer assessment;
10. There will be a change in emphasis from receiving information from the teacher, and learning to 'pass the test' towards using knowledge not only to pass the test, but on every day activity;
11. Emphasis on developing effective learning strategies (both individually and collaboratively);
12. Students have greater access to resources, feedback and feed forward.

The benefits of using a virtual learning environment has been embraced by students and teaching staff as a means of providing an integrated and versatile support mechanism for assessment. This study notes that virtual learning environment supports assessment for learning personalised, autonomous and collaborative learning. However, there was also a concern that mere use of the platform may not bring about significant improvement in students learning. The learning pathway functionality of virtual learning environment; whichever version used, allows for greater differentiation with programmes tailored to individual student's needs (not explored in this study). The study reveals a substantial increase in collaborative learning between students which is attributable to the use of virtual learning environment. It is noted that the greatest impact of the use of the platform can be achieved if teachers are also experience users who integrate its use right from the very start of their teaching in a mathematics lesson. This study also reveals that

teachers have yet to exploit the creative power of the platform in order to engage students more actively in production of knowledge. In my opinion, the impact of the platform is dependent on the ability of teachers to fully exploit the technology effectively for pedagogical purposes; however, factors beyond teachers' control – such as institutional cultures, leadership, financial, curriculum and assessment may influence or limit the uptake. In general, for schools to be able to provide inclusive and differentiated education, the use of virtual learning environment is of necessity in our current educational dispensation.

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A GENDER PERSPECTIVE ON STUDENT QUESTIONING UPON THE TRANSITION TO HIGHER EDUCATION

Abstract

This paper refers to an ongoing PhD research (2011-2014) aimed at contributing to a better understanding of student questioning in the teaching, learning and assessment processes in higher education (HE), focusing on gender. The research is being conducted with first year chemistry students at the University of Aveiro in Portugal, and is intended to conceive and implement a number of strategies that promote student questioning in the different environments provided by the subject, such as classes and online interactions. The purpose of this particular paper is to bring clarity to significant literature published on the subject and to deepen our understanding of it, to be henceforward more capable of placing our original work in the context of existing literature.

The need to emphasize student questioning in HE

The communication paradigm change in transition to HE

Research on science education highlights the need for new emphasis on teaching and learning, in particular in higher education. The transition to the tertiary level of education is one of the sharpest move students face during their academic lifetime. The admission to tertiary education is usually accompanied by an expansion on the size of the class, a growing physical distance between the students and the instructor and a dominant delivery of content by a didactic one-way lectures, which are perceived by students as impersonal and intimidating (DeBourgh, 2007). Such a learning environment can lead students to feel they are passive recipients of the instructor's lecture rather than active participants in a student–instructor interaction (Mayer *et al.*, 2009). Facing such a different setting from what they were used to, students tend to interact less with teachers, as they "feel reluctant to express an unpopular opinion and fear to be identified as uninformed or unprepared" (DeBourgh, 2007:78). This avoidance of verbal participation in classroom represents a limitation for the academic achievement of students (Neer, 1990). Because of this rejection of communication, students tend to raise fewer questions, and this can harm their academic success, as will be hereinafter stressed.

Questioning under the spotlight of the first year

In today's education, there is a call for the development of higher-order thinking skills and conceptual understanding (Lau & Yuen, 2010). Particularly Universities need to offer students a first year wherein their learning experiences assure the development of the necessary skills to empower them for lifelong learning (The European Commission, 2000; Johnston, 2010). Helping students to become lifelong learners implies the creation of the conditions for them to be able to update their own skills throughout their lifetimes.

Several authors hold that the development of the students' questioning skill has the potential to enhance several higher cognitive level capacities required for lifelong learning, such as critical analysis, problem solving and creative thinking (Cuccio-Schirripa & Steiner, 2000; Hofstein, Navon, Kipnis & Mamlok-Naaman, 2005; Teixeira-Dias, Pedrosa de Jesus, Souza, Almeida & Moreira, 2009).

Almeida, Teixeira-Dias and Martinho (2010), Pedrosa de Jesus, Teixeira-Dias and Watts (2003) and Zoller (1987) go further on, stating that the student questioning competency is not just one among others, but it is the most significant indicator of students most critical and highest order thinking. Developing such ability on students helps them "making connections to prior learning, promotes their engagement with their current understanding, makes them reflect about alternative ways of explaining phenomena, or ask why certain explanations are better than others" (Chin & Osborne, 2010:886), enhances active learning (Chin & Osborne, 2008; Chin & Osborne, 2010; Scholl, 2010) and can stimulate cognitive growth (Vogler, 2005). Moreover, "the ability to raise questions that involve higher order thinking is considered an important component of the scientific literacy" (Hofstein *et al*, 2005:802).

As the first year is a time of considerable cognitive growth and recognized importance in developing learning behavior (Harvey, Drew & Smith, 2006), before such benefits fostering a true questioning spirit of students from the first year on can result in an improvement on the quality of teaching and, accordingly, on the quality of learning (Pedrosa de Jesus, Almeida, Teixeira-Dias & Watts, 2007; Chin & Osborne, 2008; Hofstein *et al*, 2005). For this reason, the Boyer Commission's report (Boyer Commission on Education Undergraduates in the Research University, 1998) highlights the importance of promoting the questioning skill from the first year of university studies.

Questioning according to student's gender

Several authors advocate that the gender of the student may be a factor in determining student conceptual understanding, academic performance and success in higher education (Lorezo, Crouch & Mazur, 2006; Dayioglu & Turut-Asik, 2007; Harvey, Drew & Smith, 2006). Thus, having in consideration the previously noticed widespread consensus supporting the great importance of students' questions in the process of knowledge construction, a deeper insight into the clarification of existing gender differences in student questioning patterns must be gained, in order to overcome found gender fragilities and, ultimately, add to the enhancement of learning in higher education.

A further appraisal of existing literature revealed that few studies have focused on gender differences on student questioning and even fewer have concentrated on higher education. Although there is a long-standing recognition of the existence of gender differences in verbal communication (Wood, 2009; Tannen, 1990), the few existing studies are not consensual.

On one hand Pearson *et al* (1995) stated that it is not clear which gender raises more questions. On the other hand, Jones *et al* (2000) observed that boys are less frightened than girls to pose questions.

Facing such a non-consensual issue, this study aspires to contribute to the enlightenment of this matter.

HE Chemistry – an ungendered class

Recent data from the World Bank report on gender equality and development (The World Bank, 2011) highlight that currently girls participate equally (or more) than males at all education levels, including higher education. Nevertheless, women still face biases and barriers in particular fields of sciences (Wood, 2009). This is verified to such an extent that in most OECD countries the choice of HE discipline is highly gender dependent (OECD, 2006). While the proportion of women choosing advanced science and technology, or computing and engineering studies remains below 40% and 25%, respectively, women are systematically more numerous than men in life sciences (OECD, 2006). Lorezo, Crouch and Mazur (2005) also noticed this dissimilarity and added that physics comprises the largest gender disparity. The previously mentioned World Bank report also underlined that regardless of the income of the country, men continue to study engineering while women continue to learn how to be teachers (The World Bank, 2011).

Based on a significant review of existing literature Baram-Tsabari, Sethi, Bry and Yarden (2009) highlighted that despite male students prefer particular areas of science, such as physics and technology, girls are more interested in biology. The same study revealed that chemistry, on the other hand, is equally interesting to both genders. Thus, focusing on student questioning in chemistry classes, those aspects related to the students' interest on the subject could be overlooked.

Besides its gender blindness, chemistry is a particularly encouraging area of science to study, because of its impact and centrality in today's world, which brings about a contextualized teaching referred to everyday situations. This specificity of chemistry encourages and fosters interaction, discussion and debate between the teacher and the students. It is, thus, a privileged subject to develop diversified teaching, learning and assessment strategies that promote an active learning (Teixeira-Dias *et al*, 2009).

Students' online questioning according to gender

Gender differences in students' online interactions

Students who participate in online activities are more likely to be higher achievers in their educational performance (Davies & Graff, 2005; Sivapalan & Cregan, 2005).

Still, in spite of gender differences in attitudes towards technology, online communication style (Savicki, Kelley & Oesterreich, 1999), participation pattern (Penny, 2011) and computer access and application (Adamus *et al.*, 2009) have long been recognized, the juxtaposition of such studies results inconclusive. Some researchers claim that women are disadvantaged in online courses (Blum, 1999; McSporran & Young, 2001; Braten & Stromso, 2006), while others defend that males are those who are underprivileged (Young & McSporran, 2001). Braten and Stromso (2006) noticed that "males reported higher levels of participation in Internet-based communication activities than females, and females reported higher levels of strategy use when learning from conventional printed texts than males" (p. 1027).

Further insight is, thus, needed for this area of study, as a lack of agreement is verified. Researchers on science education are, hence, "challenged to identify the

characteristics that make learning environments friendly to both male and female students, and encourage participation and enhance opportunities of success for all" (Gunn, McSporran, Macleod & French, 2003:24).

Students' web-based questioning

In light of the numerous advantageous features of network technology (independence of time, place, device and platform, vast storage capacity, high processing speed, multimedia facilities, instant data retrieval and management, customizable design, ease of updating and anonymity), "there has been a growing number of projects focused on the design and development of web-based student question-generation learning systems" (Yu, 2011:485), many of which in higher education.

In a study conducted with first year chemistry students, it was noticed that "giving students the possibility to pose their questions through online systems allowed them to ruminate on their questions, to undertake reading and tackle assignments, and then to ask questions in 'down-time' when away from the formal situation" (Teixeira-Dias, Pedrosa de Jesus, Neri de Souza & Watts, 2005:1136).

Results provided by Barak and Rafaeli (2004) also sustain that web-based activities, which require students to generate questions, "can serve as both learning and assessment enhancers in higher education by promoting active learning, constructive criticism and knowledge sharing" (p. 84).

Wilson (2004) highlights that when students were asked to write exam questions and evaluate other student's responses they "improved their ability to communicate, critical thinking skills, ability to integrate facts, and motivation to do additional readings" (p. 89).

Several studies support that students themselves also recognize the benefits of online question generation systems. Yu (2009) carried a research under the premise that student question generation activities in a large class are more timely, convenient, individualized, unthreatening and logistically feasible, if conducted using computer network technology. To meet his goals, he developed an online student question generation learning system to foster student questioning and concluded that the exploitation of the affordances of computer and networked technologies is perceived as providing high levels of support for student question generation activities. Similarly, Yu, Liu and Chan (2005) remarked the importance of fostering students questioning through multimedia tools available online and noticed that by enabling students to compose questions, and criticize and adapt other students' questions, they perceived their learning as more motivating and cognitively-enhanced.

Students' web-based questioning according to gender

Few studies focusing on the questioning profiles of boys and girls have compared differences in online and in class settings. In an attempt to identify the existing barriers to an equitable participation of both genders, either in class or online, Blum (1999) undertook an investigation to compare the questioning patters of boys and girls. With this study Blum concluded that girls ask more questions than boys in class, while boys ask more and answer more questions than girls in online environments.

Concluding remarks

Regarding non-consensual gender differences in communication patterns, either in-class or online, and considering the great importance of students questions in the process of knowledge construction, it is important to investigate and characterize students questioning profiles according to their gender and to the learning environment in which they are immerse (such as classes or online environments).

As educational institutions have the capacity to "produce or reinforce gender bias and stereotypes, they can also resist to those biases and raise other values and attitudes" (Vianna & Ridenti, 1998:103). It is, thus, expected that this investigation will contribute to the clarification of gender differences on student questioning among teachers so that they are more well-informed when making decisions regarding how to facilitate instruction - either in-class or online - and how to minimize gender-related opportunity disparities. Simultaneously strategies will be developed to foster questioning, while promoting gender equity among students.

Acknowledgements

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STUDENT-CENTRED LEARNING: A DREAM OR REALITY

Annotation

Instructional approach of teaching-learning process refers to educational practices which are teacher-centred, non-interactive and prescribed. A student-centred learning process where teachers and students communicate optimally is dependent on using constructivist approach with its strategies, tools and practices. It is process-orientated, interactive and responsive to students interests.

Introduction

Learning is an intangible production of a tangible product and like all production processes, it requires someone who knows how to manage the process in order to achieve the desired result.

It really has been long enough - 12 years in the new century and still one can see the 25-30 students in traditional classrooms with students sitting in rows at the desks listening (or pretending to listen) to teachers and doing monotonous activities. Classrooms have improved, they have better desks and chairs that are more comfortable, the introduction of technology like data projectors, audio and visual systems, interactive white boards, but essentially they are designed for the same traditional mode of teaching because they are:

- teacher-centred,
- lacking flexibility,
- having limited support for technology,
- 'fixed' in design so difficult to be adapted for any other purposes,
- individual focused rather than group focused.

At the same time face-to-face and traditional distance approaches can no longer meet the needs of education and learners. Flexible learning challenges the necessity of open interactions among teachers and learners in terms of place, time and media – the goals being to increase learners' control over where, when and how they learn. Learners nowadays are:

- technology literate,
- flexible,
- multitasking,
- interactive and networked,
- reflective,
- creative and adaptive,
- anywhere anytime learners.

From Instructional to Constructivist Approach of Learning

These changes are the signs that there should be a shift from what has been labelled as the 'instructional paradigm' towards the 'learning paradigm', from a school being an institution that provides instruction to students to an institution that produces learning in students (Barr & Tagg, 1995). As pointed out by Chan & Elliot (2004) there are two main opposite conceptions in teaching and learning (traditional

and constructivist). Therefore it is important to understand in what way knowledge develops and who is the actor.

Traditional conception utilizes teacher-centred teaching strategies and sees the teacher as the source of knowledge and the student as the passive receiver of knowledge.

Constructivism is a view of learning that knowledge is not a thing that can be simply given by a teacher at the front of the classroom to students at their desks. Rather, knowledge is constructed by learners through an active, mental process of development and learners are the builders and creators of meaning and knowledge. The constructivist conception uses student-centred teaching strategies because this type of learning will help students develop critical thinking and collaboration skills and learning takes place in environments where students are able to participate actively (Chan & Elliot, 2004; Cheng, Chan, Tang & Cheng, 2009). Constructivism refers to a collection of educational practices that are student-focused, meaning-based, process-orientated, interactive, and responsive to student personal interests and needs (Goodman, 1998; Honebein, 1996).

Constructivist teaching is based on the belief that learning occurs as learners are actively involved in a process of meaning and knowledge construction as opposed to passively receiving information.

In other words the shift is from traditional or instructional teaching to constructivist or learner-centred learning.

For the constructivists, learning happens when students are engaged in a meaningful discussion in their learning surroundings (Douglas, 2006). Constructivists explain that learners remember things with the visual meanings in their minds not just facts. To the constructivists education is a method of discovery. Information is retrieved when a learner makes a personal discovery (Bruner, 1996). In constructivist classrooms teachers promote diverse thinking and problem solving skills as a means of useful learning as well as they encourage learners to learn cooperatively and think creatively to achieve better results (Katsuko, 2006).

Fosnot (1989) defines constructivist learning by reference to four principles:
1) learning, in an important way, depends on what students already know,
2) new ideas occur as students adapt and change old ideas,
3) learning involves inventing ideas rather than mechanically accumulating facts,
4) meaningful learning occurs through rethinking old ideas and coming to new conclusions about new ideas which conflict with old ones.

Constructivist ideas can be traced in Piaget works (1977) as he asserts that learning occurs by an active construction of meaning, rather than passive recipience. He explains that when students, as learners, encounter an experience or a situation that conflicts with their current way of thinking, a state of disequilibrium or imbalance is created.

In this new scheme a school and every teacher become designers of learning environment and have a role to play and a contribution to make in maintaining a learner-centred process. Today's students are changing far more rapidly than schools that recruit them. Relinquishing control is key to creating a learning-centred environment and it requires 'trust in students' (Bain, 2004). Theorists like Dewey (1916) and Piaget (1977) focused on students being responsible for their learning.

It is a process approach to learning that allows to see this process as a whole and it is ensured by constructivist strategies and activities. In a process approach, Langer and Applebee (1993, 5) explains that 'rather than emphasizing characteristics of the final products, process-orientated instruction focuses on problem-solving strategies that students need to learn in order to generate those products'.

Bloom's Taxonomy as a Learning Process

Bloom's (1956) revised taxonomy done by Anderson and Krathwohl (2001) helps to see more clearly the complexity of the learning process that goes from lower order thinking skills (LOTS) to higher order thinking skills (HOTS):

- **Remembering** – recognising, listing, describing, identifying, retrieving, naming, locating, finding.
- **Understanding** – interpreting, inferring, paraphrasing, classifying, comparing, explaining, exemplifying.
- **Applying** – implementing, carrying out, using, executing.
- **Analysing** – comparing, organising, deconstructing, attributing, outlining, finding, structuring, integrating.
- **Evaluating** – checking, hypothesising, critiquing, experimenting, judging, testing, detecting, monitoring.
- **Creating** – designing, constructing, planning, producing, inventing, devising, making.

Though, on the one hand, these can be considered as separate stages in learning but, on the other hand, it is important to perceive it as mutually linked process:

- before students can **understand** a concept they have to **remember** it,
- before students can **apply** the concept they must **understand** it,
- before students **analyse** it they must be able to **apply** it,
- before students can **evaluate** its impact they must have **analysed** it,
- before students can create they must have **remembered, understood, applied, analysed** and **evaluated**.

Learning Principles

Although learning is the activity of an individual at the same time learning is a social activity - learning is intimately associated with students' connection with other human beings, their teachers, peers, family as well as casual acquaintances. Learning is mostly a social process in which a child grows in the intellectual life that surrounds him/her (Clements & Battista, 1990).

According to the research carried out by the professionals of Eberly Center for Teaching Excellence, Carnegie Mellon University the following learning principles can be distinguished:

1. Students' prior knowledge helps learning.
   If students' prior knowledge is robust and accurate and activated at the appropriate time, it provides a strong foundation for building new knowledge (Dweck, 2002).
2. The way how students organize their knowledge influences how they learn and apply what they know.

Students naturally make connections between pieces of knowledge. When those connections form knowledge structures that are meaningfully organized, students are better able to retrieve and apply their knowledge effectively and efficiently (Anderson, Conrad, Corbett, 1989).

3. Students' motivation determines, directs, and sustains what they do to learn. Renninger (2004) explains that when students find positive value in a learning goal or activity, expect to successfully achieve a desired learning outcome, and perceive support from their environment, they are likely to be strongly motivated to learn.

4. To develop mastery, students must acquire component skills, practice integrating them, and know when to apply what they have learned.
   They have to learn when and how to apply the skills and knowledge they learn.

5. Goal-directed practice and targeted feedback enhances the quality of students' learning.
   Learning and performance are best facilitated when students engage in practice that focuses on a specific goal or criterion, targets an appropriate level of challenge. Wiggins (1998) says that practice must be coupled with feedback that provides information to help students progress in making progress.

6. Students' current level of development interacts with the social, emotional, and intellectual climate of learning process.
   Students are not only intellectual but also social and emotional beings and they develop the full range of intellectual, social, and emotional skills.

Conclusion

There is an obvious need to ensure this learner-centred or constructivist approach in teaching–learning process on all levels of education. Though constructivist approach has comparatively long history still it is not enough embedded in the learning process. Thus further research is necessary to find out what are the skills of teachers allowing them to implement constructivist approach and what changes there must be in students to take over the responsibility and power of their own learning.

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ГАБИТ КАПЕЗОВИЧ КЕНЖЕБАЕВ, САУЛЕ ХАЙРУЛЛОВНА
БАЙДИЛЬДИНА, ТЕНЛИК ТОКТАРБЕКОВНА ДАЛАЕВА

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ПРОБЛЕМЫ ФОРМИРОВАНИЯ E-LEARNING КОНТЕНТА В СФЕРЕ ИСТОРИЧЕСКОГО ОБРАЗОВАНИЯ РЕСПУБЛИКИ КАЗАХСТАН

PROBLEMS OF DEVELOPMENT OF E-LEARNING CONTENT IN HISTORICAL EDUCATION ON THE REPUBLIC OF KAZAKHSTAN

Abstract

Using information and communication technologies in the learning process has become the permanent paradigm of modern education. Using new information technologies in education is an urgent task. In the world of pedagogical practice, it is important to share digital resources developed with pedagogical support.

According to the Decree of the President of the Republic of Kazakhstan dated February 1, 2010 № 922, "On the Strategic Plan for Development of Kazakhstan till 2020", the Ministry of Education and Science of Kazakhstan has developed the "State Programme for the Development of Education of the Republic of Kazakhstan for 2011-2020". One of the main directions of the State Programme for the Development of Education in the Republic of Kazakhstan up to 2020 is the introduction of e-learning.

The main objective of e-learning is increasing the urban and rural schooling, as well as, technologically literate students.

In Kazakhstan, the theoretical studies and the development of educational materials in digital format, is a task of the joint-stock company "National Center of Information Technologies." The staff of the Faculty of History of the Kazakh National Pedagogical University, named after Abai, participated as core developers of content on the subject "History of Kazakhstan" for grades 5 to 11, in secondary schools of the Republic of Kazakhstan. Scientific management of this project was carried out by the Dean of the Faculty of History, Dr. Kenzhebayev G.K.

At the present time, the development of e-learning systems within higher education institutions in Kazakhstan is a priority in the strategy of innovative progress. In order to create professional content on the subject "New History of Kazakhstan" in 2011, the creative team from the Faculty of History Kazakh National Pedagogical University, named after Abai, started to develop and create the Electronic Research Laboratory on the history of Kazakhstan. The Electronic Research Laboratory is, on the one hand, an information educational environment in the domain of knowledge for both teachers and students, on the other hand, it uses e-learning as an interactive remote interface for the subjects of the educational process.

The main forms of presenting historical information in a virtual environment are static text and illustrations. Using specific features of the virtual media (such as, multimedia, intelligence, modelling, interactive communication) in order to activate

the learning process is still very limited. The contents are mainly presented through illustrated historical texts, with a very limited application of modelling and animation, video and audio resources. This situation determines the urgency of improving the new learning environment in terms of the historical components of its content.

At the present stage, the main aim is to develop educational resources that rely on computer technology, in order to present digital information to harmoniously complement the traditional means of learning historical material. Undergraduate students must master the common approaches to perception, processing, management and storage of information on the history of science, regardless of whether it is represented by a book or posted on an electronic medium. They need to learn new forms of processing and displaying the results of the historical material (computer slide shows, electronic presentations, etc.) to be prepared to work in a school of the XXI century.

Одной из характерных тенденций развития современной науки и образования является междисциплинарный характер научных исследований. Существенным фактором интеграции различных сфер научного знания становится рост влияния и использования возможностей единого информационного и образовательного пространства (ЕИОП). Постоянной парадигмой современного образования становится философия информационно-коммуникационного взаимодействия субъектов учебного процесса. Информатизация образования составляет процесс обеспечения сферы образования методологией и практикой разработки и оптимального использования современных новых информационных технологий, ориентированных на реализацию психолого-педагогических целей обучения и воспитания. В общемировом масштабе сложилась устойчивая тенденция увеличения затрат на создание и поддержку инфокоммуникационной инфраструктуры систем образования, аппаратно-программное обеспечение, разработку цифровых образовательных ресурсов и технико-педагогическую поддержку.

Теоретико-методологической базой изучения проблем E-Learning являются теоретические положения об использовании ИКТ в системе образования (С.Г. Григорьев, В.В. Гриншкун, М.Ю. Бухаркина, А.В. Могилев, М.В. Моисеева, Е.С. Полат, А.Е. Петров, Е.Н. Ястребцева и др.); теоретические положения о развитии единой информационной образовательной среды и ЕИОП (А.А. Веряев, С.Д. Каракозов, М.В. Макарова, Е.Л. Максимова, С.Н. Поздняков, Е.С. Полат, В.И Солдаткин); источниковедческие исследования электронных источников на примере изучения истории Казахстана (К.Алимгазинов, С.А.Жакишева); теоретические положения психолого-педагогических аспектов использования ИКТ в образовании (Г.К. Нургалиева, А.И. Тажигулова, Е.С. Полат и др.); исследования образовательного Интернет-пространства (Я.С. Быховский, Дайсон, В.И. Стражев, Д. Тиффин, Э.Л. Финогеева, Е.В. Якушина); методология создания веб-сайтов (Ю. Гурский, II.

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В соответствии с общим индексом зрелости информационного общества «Information Imperative Index», который устанавливает стандарт измерения возможностей страны в доступе и использовании информации на основе ИКТ Казахстан занимает 69 место среди 159 стран мира, в том числе 73 место по ИКТ инфраструктуре [2], 87 - по количеству Интернет пользователей, 65 - по уровню компьютерной грамотности населения, специалистов ИКТ, по информированности и мотивированности, 62 - по оснащенности программно-аппаратным обеспечением, 75 - по использованию ИКТ в образовании, что определяется по доступу учебных заведений к ИКТ и их использованию в учебном процессе. Инфокоммуникационное обеспечение системы образования Казахстана значительно отстает от таких стран-лидеров, как Швеция, Люксембург, Южная Корея, Дания, Нидерланды, Исландия, Япония, Гонконг, Китай, Сингапур, Австралия и др. По сравнению со странами СНГ Казахстан отстает от Российской Федерации и Беларуси [3].

Использование новых информационных технологий в обучении является актуальной задачей. В мировой педагогической практике увеличилась доля цифровых ресурсов, разработанных в соответствии с образовательными программами. В Эстонии более 70% школьных учебных программ имеют поддержку цифровыми ресурсами, в Голландии – 90%. В Казахстане цифровые ресурсы для школьников разрабатываются достаточно активно, но оснащенность ими школ по областям находится в диапазоне от 5% до 36% (данные 2010 г.). Всего 10% содержания учебных программ технического и профессионального образования переведено в цифровой формат.

Доказано, что использование ИКТ в образовании в 3 раза интенсифицирует учебный процесс, в тоже время в 2-3 раза улучшает качество обучения, что подтверждают ученые-педагоги разных государств (США - Симур Паперт, профессор, основатель педагогической философии конструкционизма, Индия – Абдул Вахид Хан, заместитель Генерального директора ЮНЕСКО, Россия – НИИ информатизации образования РАО Роберт И.В., специальное исследование Каймина В.А.; Казахстан – научная школа профессора Нургалиевой Г.К.).

Социальный аспект внедрения ИКТ в школьное образование состоит в том, что все казахстанские школы, в том числе сельские (79% от общего числа школ), из них 55% малокомплектных и отдаленных, получат равный доступ к дистанционному обучению по всем школьным предметам с 1 по 12 классы. Внедрение ИКТ в систему профессионального образования обеспечит возможность дистанционного обучения по доступной стоимости.

По Указу Президента Республики Казахстан от 1 февраля 2010 года № 922 «О Стратегическом плане развития Республики Казахстан до 2020 года» МОН РК была разработана «Государственная программа развития образования Республики Казахстан на 2011-2020 годы».

В условиях глобализации казахстанская система образования 2020 года будет функционировать как часть единого мирового информационно-образовательного пространства. Будут осуществляться максимальный учет международного опыта в области информатизации образовании, устойчивое

партнерство с международными институтами развития в области ИКТ и ведущими IT компаниями. Система образования 2020 года будет функционировать в нормативно-правовом поле информатизации образования, определяющем все регламенты и стандарты компьютеризации и интернетизации; организации открытого дистанционного обучения; разработки, апробации и тиражирования цифровых образовательных ресурсов и создания казахстанского компонента Интернет-среды; технической и педагогической поддержки инфраструктуры и программного обеспечения учебного процесса. Организации всех уровней образования в 2020 году будут полностью обеспечены компьютерами нового поколения. Если в 2008 году оснащение школ характеризуется наличием компьютеров в соотношении 1: 21, профшкол и лицеев – 23, колледжей – 19, вузов – 10, то в 2020 году это соотношение достигнет показателя 1:1, что будет соответствовать мировым показателям обеспеченности организаций образования компьютерной техникой.

Стратегические ориентиры образовательной политики Республики Казахстан в области информатизации образования будут развиваться по 8 направлениям [1]:

1. Совершенствование нормативно-правового обеспечения;
2. Интенсификация подготовки педагогических и управленческих кадров;
3. Создание отечественных цифровых образовательных ресурсов (ЦОР);
4. Компьютеризация системы образования и обновление компьютерного парка;
5. Модернизация аппаратно-программного обеспечения;
6. Интернетизация;
7. Технологическая и техническая поддержка развивающейся инфраструктуры системы образования;
8. Внедрение единой информационной система управления образованием (ЕИСУО).

Одним из основных направлений Государственной программы развития образования в Республике Казахстан до 2020 года является внедрение электронного обучения.

Основная цель электронного обучения: выравнивание уровня городского и сельского школьного образования, подготовка мыслящего и технологически грамотного учащегося.

В своем интервью от 28 марта 2011 года заместитель Генерального директора ЮНЕСКО по вопросам коммуникации и информации Янис Карклинс для журнала «Информационное общество» отметил: «На сегодняшний день важнейшей проблемой является неравный доступ к ИКТ разных стран, городских и сельских жителей. Это возможно путем международного сотрудничества и партнерства в интересах создания «информационного общества для всех», обеспечения всеобщего доступа к информации, которая может использоваться для повышения качества жизни людей»[3]. В рамках реализации данного направления Государственной программы каждая организация образования будет обеспечена цифровыми образовательными ресурсами, широкополосным Интернетом со скоростью 4-10 Мбит/сек. Внедрение системы электронного обучения предполагает

полную автоматизацию учебного процесса и статистики (электронные журналы, библиотеку, расписание, дневник, sms-оповещение родителей). Учителя и учащиеся получат доступ к лучшим мировым образовательным ресурсам. Материально-техническая база организаций образования будет укрепляться самым новейшим оборудованием.

Нормативная правовая базы системы электронного обучения разрабатывается на основе международных стандартов и технических регламентов эксплуатации системы электронного обучения. В 2011 году на создание цифровых образовательных ресурсов для 5 – 12 классов из республиканского бюджета было предусмотрено 203,1 млн. тенге. Реализация проекта "E-learning" в Республике Казахстан предусмотрена в 2 этапа. На первом этапе 2011–2015 годы будет подключено к системе более 50% организаций образования. На втором этапе 2016–2020 годы более 90% организаций образования [4].

3 ноября 2011 года в Астане проходил 5-ый Международный форум «Информатизация системы образования», посвященный 20-летию Независимости Республики Казахстан. Форум был направлен на обсуждение новой парадигмы обучения как инфокоммуникационного взаимодействия субъектов образовательного процесса в условиях интеграции традиционного и электронного обучения.

На форуме был презентован цифровой доклад «Инновационное развитие системы образования Республики Казахстан на основе инфокоммуникационных технологий и электронного обучения».

Составной частью цифрового доклада была презентация проекта МОН РК «Система электронного обучения (e-learning)», которая стартовала в 2011 году в 44 экспериментальных школах.

Цифровые образовательные ресурсы, которые представлены в рамках данного проекта, были основаны на дисциплине «История Казахстана». Контент цифровых образовательных ресурсов включал следующие компоненты:

- мультимедийная презентация материала по теме урока;
- интерактивные задания по теме урока, на основе использования программ;
- иллюстративный материал;
- тесты по теме урока для самопроверки усвоения нового материала.

В Казахстане проблемами теоретического изучения и создания учебных материалов в цифровом формате занимается АО «Национальный центр информатизации». Сотрудники исторического факультета КазНПУ имени Абая участвовали в качестве основных разработчиков контента по дисциплине «История Казахстана» для 5 – 11 классов общеобразовательных школ Республики Казахстан: для 5 класса – профессор Абдугулова Б.К., для 6 класса – преподаватель Манкеев Н., для 7 класса – доцент Байдильдина С.Х., для 8 класса – доцент Толеубаева К.М., доцент Далаева Т.Т., для 9 класса – старший преподаватель Ахатаева К.Б. Научное руководство данным проектом осуществлял декан исторического факультета, д.и.н. Кенжебаев Г.К.

Развитие E-Learning системы в рамках высших учебных заведений в Казахстане на настоящий период становится приоритетной задачей в реализации стратегии инновационного развития нашей республики. Во многих

вузах внедряется система дистанционного обучения, проводятся интерактивные онлайн-семинары, сформирована и постоянно пополняется база электронных образовательных ресурсов в виде рабочих учебных программ и силлабусов, учебно-методических комплексов, представленные в основном в текстовом формате. Во многих вузах сегодня приступили к созданию оригинальных электронных учебных пособий с целью подготовки необходимых условий для развития E-Learning.

Вместе с тем, к сожалению, процесс освоения истории Казахстана в вузах подкрепляется в основном текстовой литературой, а современные информационные технологии используются в этих целях довольно редко. Кроме того, в существующих учебниках содержание истории Казахстана рассматривается преимущественно на феноменологическом уровне, что не способствует пониманию сути описываемых явлений, вынуждает студентов прибегать к механическому заучиванию учебного материала. Следует также отметить, что основные теоретические положения истории Казахстана, усвоение которых помогает ее осознанному изучению, в большинстве обычных (бумажных) учебников излагаются достаточно сложно. Успех в изучении истории во многом зависит от формирования у студентов образных представлений об исторических событиях и формирования их способностей поиска – выбора – оценки – проекции.

С целью создания профессионального контента по дисциплине «Новая история Казахстана» в 2011 году творческая группа сотрудников исторического факультета КазНПУ имени Абая под руководством декана, д.и.н. Кенжебаева Г.К. приступила к разработке и созданию Электронной научно-исследовательской лаборатории по истории Казахстана.

Электронная научно-исследовательская лаборатория (ЭНИЛ) – это предметно-ориентированная платформа электронного обучения студентов 3 курса исторического факультета в условиях кредитной системы обучения, в котором будет возможно использовать большое количество разнообразных источников для организации научно-исследовательской работы студентов бакалавриата. Учебный материал был расположен в соответствии с темами Типовой программы по дисциплине «Новая история Казахстана» в объеме 3 кредита (135 часов). Учебный курс выстроен в виде базы данных исторического характера, широкого круга разнообразных заданий к ним. База содержит документальные фотографии, картины, рисунки, схемы, карты, атласы, а также терминологический словарь, блокнот для индивидуальных записей. Электронная научно-исследовательская лаборатория ориентирована на международное образовательное пространство путем формирования каталога известных библиотек, научно-исследовательских институтов и центров, Интернет сайтов и порталов по проблемам всемирной истории и истории Казахстана.

Электронная научно-исследовательская лаборатория представляет собой, с одной стороны, единую информационно-образовательную среду в предметной области знаний, как для преподавателей, так и студентов, с другой – технологию электронного обучения как интерактивного дистанционного взаимодействия субъектов образовательного процесса.

Гуманитарные образовательные порталы и сайты Интернет открывают пользователю доступ к более разнообразным по содержанию и масштабным по объему электронным ресурсам по истории. Это:

- энциклопедии и энциклопедические словари, включающие сведения по истории Казахстана и всемирной истории;

- курсы лекций и учебные материалы по истории Казахстана и всемирной истории;

- виртуальные музеи, разнообразный иллюстративный материал;

- электронные версии статей и книг исторического содержания.

Основными формами представления исторической информации в виртуальной среде являются текст и статичные иллюстрации. Активизирующие учебный процесс специфические функции виртуальной среды (*мультимедиа, интеллектуальность, моделинг, интерактив, коммуникативность, производительность*) задействованы авторами-разработчиками исторического *e-Learning* «контента» пока весьма ограниченно. В основном это иллюстрированные исторические тексты при очень ограниченном применении моделей и анимации, видео- и аудиоресурсов. Такое положение дел определяет актуальность проблемы совершенствования новой среды обучения в плане развития исторической компоненты ее содержания.

В настоящее время инфраструктура вузов Казахстана характеризуется компьютерными кабинетами информатики, серверными, интерактивными лекционными залами (ИЛЗ), мультимедийными лингафонными кабинетами (МЛК), научными виртуальными лабораториями (НВЛ), технопарками, цифровым учебным телевидением, электронными читальными залами, ресурсными центрами, медиатеками и Интернет-кафе. Казахстанские вузы достаточно хорошо оснащены электронными досками, мультимедийными проекторами, видеокамерами, телевизорами, видеомагнитофонами, фото-аппаратами, DVD/VCD-плеерами.

Технологическая инфраструктура характеризуется доступом вузов к Интернет на базе различных каналов связи: аналоговой, выделенной, беспроводной, спутниковой, мобильной и др.

На современном этапе развития системы образования компьютерные технологии предъявления учебной информации должны гармонично дополнять традиционные средства изучения исторического материала. Студентам бакалавриата необходимо овладеть общими подходами к восприятию, обработке и рациональному использованию и хранению информации по истории науки независимо от того, представлена ли она книгой или размещена на электронном носителе. Они должны овладеть и новыми формами обработки и визуального представления результатов работы с историческим материалом (компьютерные слайд-шоу, электронные презентации и др.), чтобы быть готовыми работать в школе XXI века.

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АЙГЕРИМ КОШЕРБАЕВА, КУЛЬМЕСХАН АБДРЕИМОВА, АСЕМ АНУАРБЕК

МИРОВАЯ ПЕДАГОГИЧЕСКАЯ МЫСЛЬ В КОНТЕКСТЕ СРАВНЕНИЯ: КОНФУЦИЙ – АЛЬ ФАРАБИ – ИБН СИНА – БАЛАСАГУНИ

AIGERIM KOSHERBAYEVA, KULMESKHAN ABDREIMOVA, ASEM ANUARBEK

THE WORLD PEDAGOGICAL IDEA IN THE CONTEXT OF COMPARISON: CONFUCIUS – AL FARABI – IBN SINA – BALASAGUNI

Abstract

This paper presents a historical-comparative analysis of pedagogical and humanistic ideas of Confucius (551 – 479 BC), Al-Farabi (870 – 950), Ibn Sina (980 – 1037) and Balasaguni (1019 – 1085). The authors of the paper try to establish and develop a model of comparison comprising the fundamental ideas, statements, lessons and heritage of these four great thinkers. The research aims at putting Kazakh pedagogy on the world wide map and showing its historical connections with ancient Eastern civilizations. The relevance of this research appears in connection with the globalization process, which requires researching the problems of Kazakhstan's pedagogy worldwide. The tremendous scientific interest is the legacy of famous eastern philosophers and forming a view of their thoughts from the perspective of a historical-comparative analysis. In the authors' opinion this approach will discover new intercultural moments of ancient Eastern civilizations, will assess the creativity of prominent thinkers, and will trace the moments of accord of ideas in a united eastern mentality. For this purpose, the authors introduce a model of comparison: Confucius – Al Farabi – Ibn Sina – Balasaguni, which clearly emphasizes pedagogy of humanism.

Confucianism, by definition of German philosopher Karl Jaspers, is "axial time", which is a special period of humanity. Thus, this historic event is an origin, to which leading lights of science in Central Asia may be treated. The famous Chinese philosopher lived twenty-five centuries ago, but the distance of centuries is not a hindrance, and it is the evidence of a united mentality in the eastern pedagogy. Confucius did not like to talk about him. Therefore, he described his life in a few words: "At 15 years I turned my thoughts to the study. At 30 years I had independence. At 40 years I managed to free from doubt. At 50 years, I learned the will of Heaven. At 60 years I learned to distinguish the truth from falsehood. At 70 years I followed the desires of my heart and did not violate the Ritual."

From the life of Confucius we can select the bright grains of his humanistic views, which are alike the ideas of Al-Farabi and Balasaguni. For example, the ideas of Balasaguni about the human age – forty, fifty, sixty and seventy years of age – are almost equal. The ideas about human age in the poem of Yusuf Balasaguni form a separate topic. Yusuf Balasaguni pays much attention to the teaching of the young generation. And his thoughts about this sound repeatedly: "Your youth will flash; you must know in advance that life will go away. Do not waste your youthful

strength in vain, humble prayer will be faithful. Oh, where is my adolescence, I severely confess, so that this benefit – I have finished the word.”

Confucius got free from doubt at forty years, which means a training of hard position, a clear outline of thoughts. Yusuf Balasaguni defined this period as a farewell with youth, the same as the formation of “I – position”. According to Confucius, the age of 50 is learning the will of Heaven, and the age of 60 is learning to distinguish the truth from falsehood. The same thoughts can be found in Yusuf Balasaguni: “I was a black raven and became a white swan, and my sixth decade says ‘Go!’ - Complete if there is no trap in front”. Confucius values the past and every segment of life. Thus, both philosophers present the value of human life stages that provide knowledge from age psychology.

The understanding of the process of creativity is similar in the teachings of Confucius and another world teacher Al-Farabi. The principle of fair and balanced governance and the principle of humanity in the relationship between human beings are the main for both thinkers. The famous phrase “The terrible power is crueler than the ferocious tiger!” belongs to Confucius. The Great Master expressed the most humane principle of management of social activities. And he was prohibitively right. In general, the attention of Confucius was focused on the mental, moral and spiritual potential of the man. It means that humanity, justice, good behavior, and knowledge, are the conditions of harmony between people.

The ethical-philosophical world views of Confucius are set out in the scheme: “The teacher said” or “The teacher answered”. Here are some of them:

The teacher said: “Humanity is rarely combined with a skillful and clever speech expression”. Teacher Zeng said: “I ask myself three times a day: Do I work in good faith? Do I retain sincerity in communicating with friends? Do I repeat what I was taught?”

Simplicity and accessibility of thoughts can be seen in these sayings: humanity has nothing to do with flattery and cunning; people every day aim to address three issues of human: honest work, open communication and excellence of conduct. There are obvious common features between Confucius and Ibn Sina. Moreover, there is an identity of views. Virtues give us an absolute perfection, which is the highest happiness. This is what they prefer and what they want for their own sake and what they never prefer for the sake of somebody else. The purpose of the virtues is approaching the Absolute Good. A person should try “to make possible the proximity to the Absolute Good, and this approach acquires virtue and perfection”. In our view, Confucius and Aristotle, and after them – Al-Farabi and Ibn Sina often equate virtue with knowledge. Justice, mercy and generosity are among the ethical virtues of Ibn Sina. He considers justice as one of the most important foundations of morality and of human society. He outlines a “call for inviolable justice” as the most “important principle in life of the human race”. In general, it should be noted, Abu Ali Ibn Sina is great not only for its diverse and profound scientific research. He was a true humanist and advocate of the idea of progress and moral freedom. He was one of the first who threw a bridge between East and West. He introduced the Aristotelian doctrine of the Peripatetic school to East, and equipped Europe with Asian medicine, and he gave the West the ancient medical experience of his country. Therefore, with good reason he was called “the sage of the East and West”.

The consonance of the East thinkers' views is seen in education. According to Confucius, a person brings valuable qualities by constant exercise. Child-rearing practices are not complicated, but convincing. Confucius exalts the individual teacher. He compares him to the elusive phenomena of the world. The teacher is the sun and moon, and they can not be achieved. Confucius says: "Nobody can compare with the teacher, as nobody can climb the stairs to the heaven".

All the essence of the man to rule the people is represented in Confucian thoughts. Namely, the art of governance characterizes the place of the teacher in society and idealizes his profession. The facts of ancient history indicate that two kinds of professional activities were important to society – the ruler and the teacher. That is why these figures occupy dominant positions in the writings of Confucius. The distinguished leader and the mentor are clearly positioned in the heritage of Balasaguni. They are popular educators, people pointing the way to happiness. They dominate over whole society.

Thus, the humanistic principles are typical for both the era of Confucius and the era of Al-Farabi, Ibn Sina and Balasaguni. Despite the time distance, the sage's thoughts are the common component that spiritually unifies them and their people as well. The humanistic principles of transformation of personality never exhaust and are valuable for all societies and ethnic communities. This is one of the specific features of humanistic pedagogy.

В образовательном пространстве современности актуальное значение имеет педагогика гуманизма. Уникальная система гуманизма свойственна восточной культуре с глубокой древности. *Восточная педагогика была призвана помочь человеку в овладении жизненными добродетелями, в становлении нравственности.*

В концепции познания мира и педагогики гуманизма модель сравнения *Конфуций – аль-Фараби – Ибн Сина – Баласагуни* выглядит наиболее весомо. *Конфуцианство,* по определению немецкого философа Карла Ясперса «осевое время», особый период человечества. Исходя из этой оценки, данное историческое явление могло выступать в качестве источника к чему, возможно, обращались центрально-азиатские корифеи науки.

Известный китайский мыслитель-гуманист жил намного столетий раньше, но отдаленность веков не помеха, а свидетельство единого менталитета в рамках восточной педагогики. Конфуций не любил рассказывать о себе. Поэтому свой жизненный путь сумел описать в нескольких строках: «В пятнадцать лет я обратил свои помыслы к учебе. В 30 лет я обрел самостоятельность. В 40 лет сумел освободиться от сомнений. В 50 лет я познаю волю Неба. В 60 лет научился отличать правду ото лжи. В 70 лет я стал следовать желаниям моего сердца и не нарушал Ритуала». В этом высказывании несколько этапов: путь от учебы через познание «воли Неба» к свободному следованию «желаниям сердца» и добровольному соблюдению норм поведения, которые он считал священными и «небесными», стал нравственным ориентиром всей китайской традиции. Его учение весьма многогранно, оно включает в себя совокупность духовных и социальных норм,

которые передавались из поколения в поколение на протяжении почти 2,5 тыс. лет. Правила эти касались воспитания человека, определяли его поведение в семье, на службе и в обществе, устанавливали способ мышления. До сих пор именно конфуцианство служит тем источником, из которого исходит огромный духовный заряд, свойственный всему человечеству.

Сегодня во всем мире вряд ли найдется человек, не слышавший о конфуцианстве и его знаменитом основателе Конфуции (551-479 до н.э.), имя которого в китайском произношении звучит как Кун-цзы или Кун-фу-цзы (Мудрец Кун). В древних книгах его называют просто Учителем и, читателю сразу становится ясно, что речь идет о великом наставнике, который стал нравственным идеалом сотен миллионов людей.

Из небольшого экскурса о жизнедеятельности Конфуция можно отобрать яркие крупицы его гуманистических воззрений, созвучные идеям аль-Фараби и Баласагуни. Так, например, суждения Баласагуни о человеческом возрасте: сорок, пятьдесят, шестьдесят, а затем и семьдесят лет воспринимались мыслителями примерно одинаково. Размышления о человеческом возрасте в поэме Юсуфа оформляются в отдельную тему. В наставлениях молодому поколению, на стихотворных бейтах о смысле и назначении каждого жизненного отрезка, Юсуф акцентирует огромное внимание. Причем мысли в этом плане звучат неоднократно: *«Мелькнет, твоя люлодость – най наперед, и – как не удерлсивай – жизнь отойдет. Не трать свои юные силы напрасно, смиреной молитве будь верен всечасно. О, где моя юность! Я каюсь сурово, да что в этом пользы – кончаю я слово».*

Конфуций в сорок лет сумел освободиться от сомнений, что означает воспитание твердости позиций, четкое очертание мыслей. Юсуф Баласагуни определяет этот промежуток как прощанье с молодостью и вступление на путь зрелости, тоже самое, что становление «Я – позиции». У Конфуция пятьдесят лет – это познание воли Неба, шестьдесят – разделение правды ото лжи и т.д. Примерно эти же мысли сопровождают Юсуфа. Эти годы подчеркивают зрелость человека. Сравнение в этом плане: *«Был вороном черным – стал лебедем белым; И кличет шестой мой десяток. «Иди!» – Пройду, если нет западни впереди. Когда шестьдесят уже минуло мужу, Сменил летний зной он на зимнюю стужу»* [3]. Надо отметить то, что элегия Юсуфа о возрастных этапах человека скорее проникнута мотивами сожаления. Поэтому превалируют такие выражения: *Был прям, как стрела, я – согнулся, как лук, и в сердце, не ведавшем страха, испуг.* В автобиографической исповеди Конфуция иначе. Мыслитель характеризует возраст через сумму своих познаний: от «воли Неба» к свободному следованию желаниям сердца и традиционным нормам этики. Чувственные познания преобладают в преклонном возрасте. Предстает образ мудрого и остепененного старца. Конфуций дорожит прошлым и дорожит каждым жизненным отрезком. Таким образом, оба мыслителя стремятся продемонстрировать ценность этапов человеческой жизни. дают знания из области возрастной психологии. Их учение убеждает, что процессом воспитания легче управлять, зная специфику каждого периода.

Сходным в учениях Конфуция и Второго Учителя мира аль-Фараби можно назвать процесс развития творческих начал. Принцип справедливого и гармоничного управления государством и принцип гуманности во взаимо-

отношениях между людьми являются для обоих мыслителей главенствующими. Великий гуманист Юсуф Баласагуни посвящает этому целую поэму. Конфуцию принадлежит знаменитое выражение: «Жестокая власть страшнее свирепого тигра!» Великий Учитель выразил самый гуманный принцип управления социальной действительностью. И был непомерно прав. Идеи в этом русле впоследствии становятся главным не для одного поколения философов и педагогов. В целом во внимании Конфуция – человек, его умственный и нравственно-духовный потенциал. *Человеколюбие (жень), справедливость (и), благонравие (пи) и знание (чжи) – условие гармонии между людьми* [2].

Этот принцип Конфуция составляет фундамент воспитания личности. Достаточно хорошо они выделены в «Кутадгу билиг». В учении Юсуфа Баласагуни категория справедливости поставлена на первое место. Знание и учение совершенствуют и развивают человека. Аналогично у Конфуция, который убеждает, что внутреннее богатство человека раскрывается через образование. Бесспорными для обоих мыслителей являются категории благонравия и добродетели.

Очевидность родственных линий можно продемонстрировать и на таком историческом параллелизме. Как известно, слово «humanities», привнесенное из древности Цицероном и веденное в оборот последователями Петрарки Колюччо Салютати (1331-1406) и Леонардо Бруни (1369-1444), понималось в значении человеческого начала и влечения к знаниям. Развивая эту точку зрения, академик Н. Конрад приводит в аналогичных значениях, но только в китайской языковой формуле слово «жэнь», введенное мыслителем Хань Юй именно для того, чтобы им обозначить отличие «Пути» его времени от «Пути» до него. Слово же это он нашел в древности у Конфуция. Какой смысл имеет китайское «жэнь» у самого Конфуция предельно ясно. На вопрос: «что такое «жэнь», он ответил – «любовь к человеку». Хань Юй сказал иначе – «любовь ко всему». Формула «жэнь–humanities» выступает как категория общественной морали, а это означает их принадлежность к человеку в целом. Совершенно сходно с иноязычными определениями по смысловой структуре и семантике тюрко-язычное «Кутадгу». В казахском языке оно передается понятием «кут», в русском переводе (по С. Иванову) – «благодать». Отсюда: «Кутадгу билиг» – «Благодатное знание». Слово «Кутадгу» несет большую смысловую нагрузку и связывается со счастьем, удачей. Все новое в человеке и образе его жизни издревле сопровождалось пожеланием «кутты болсын». Отсюда: «Осчастливливающее знание», «Указание пути к счастью». Те самые мотивы мы встречаем в трактатах аль-Фараби. Это естественно, его идеями о гуманизме питалось не одно поколение мыслителей.

Свое понимание «человечности» китайский мыслитель Чэн Мин-Дао выражает в такой цепи рассуждений: «человечность в человеке стоит в ряду с другими его свойствами», они следующие: органически присущее человеку чувство «должного», т.е. стремление делать то, что следует; чувство «занятости», понимание необходимости всегда оставаться в рамках каких-то норм, т.е. своего рода внутренняя дисциплинированность, стремление к знанию и способность его иметь, наконец, правдивость. «Человечность» (жэнь – humanitos) стоит в ряду этих свойств. Тоже самое можно сказать и о

«Кутадгу билиг», который раскрывает систему четырех понятий гуманизма. К формуле: «жэнь – humanities» в этом случае приравнивается **«кутадгу»** как показателя возрожденного общества караханидов. К сожалению, о Юсуфе Баласагуни с его значительной дидактической и философской системой, без труда претендующих на Ренессанс, в известных исследованиях не сказано ничего.

Вернемся к Конфуцию. Основы этико-философского мировоззрения Конфуция изложены в схеме: *«Учитель сказал» или «Учитель ответил»*.

Вот некоторые из них:

Учитель сказал: „Человечность редко сочетается с искусными речами и умным выражением лица".

Учитель дзэн сказал: „Я на день трижды себя вопрошаю: добросовестно ли я трудился? Сохранил ли искренность в общении с друзьями? Повторял ли то, чему меня учили?". [2]

В приведенных изречениях привлекает простота и доступность мыслей: человечность не имеет ничего общего с лестью и хитростью, каждый день человек нацелен на решение трех гуманных вопросов; добросовестного труда, открытого общения и совершенства поведения. В учениях о добродетели видится особенная близость Конфуция с Ибн-Синой. Причем наблюдается тождество взглядов. При рассмотрении добродетелей лейтмотивом Этики ИбнСины, также как у аль-Фараби, а затем и у Юсуфа Баласагуни было *совершенстео*. В Этике Ибн Сины оно происходит путем приобретения добродетелей. Добродетели дают нам абсолютное совершенство, которое является высшим счастьем. Это то, что предпочитают и чего желают ради него самого и что никогда не предпочитают ради чего – либо другого. Цель в добродетелях заключается, в приближении к Абсолютному Благу. Человек должен стараться «для того, чтобы сделать возможной близость к Абсолютному Благу и чтобы из приближения к нему приобретались добродетель и совершенство».

На наш взгляд, Ибн-Сина вслед за Конфуцием, Аристотелем, аль-Фараби нередко отождествляет добродетель с сознанием. Первой, по его мнению, важной добродетелью является мудрость, которая заключается в знании Абсолютного Блага. Кто ничего не знает и не стремится знать, тот живет по велению животной души «он впадает в порок и вредит разумной душе». «Мудрость, на наш взгляд, – писал «Князь ученых» – бывает двоякой. Во-первых, это совершенное знание. Во-вторых, это совершенное действие. Это совершенство состоит в том, что все необходимо для его бытия и все необходимо для его сохранения».

Среди этических добродетелей Ибн-Сина особо выделял *справедливость, милосердие, щедрость*. По его мнению, без воспитания этих добродетелей не может существовать ни одно человеческое общество. Ибн-Сина считал справедливость одной из важнейших основ морали и человеческого общежития. Он возводил «призыв к нерушимой справедливости» в ранг самого «важного принципа в жизни рода человеческого». В целом, необходимо отметить, Абу али Ибн-Сина велик не только своей разносторонней и глубокой научной деятельностью. Он был истинным гуманистом и борцом за идеи прогресса и моральной свободы. Одним из первых он

перекинул мост между Востоком и Западом, познакомил Восток с учением перипатетиков аристотелевской школы, а Европу – с азиатской медициной, передал Западу древнейший врачебный опыт своей родины. Поэтому с полным основанием его назвали «мудрецом Востока и Запада».

Созвучие взглядов мыслителей Востока видится в воспитании. По Конфуцию, методом постоянных упражнений, личность воспитывает ценные качества. Конкретно определяются Учителем обязанности детей. Методы воспитания детей не сложны, но убедительны. *Учитель говорит:* Дома младшие почтительны к родителям, а на стороне послушны старшим, *осторожны* и правдивы, полны любви ко всем, но близки с теми, в ком есть человечность. Если при этом остаются силы, то стремятся обрести ученость.

Слова Учителя заставляют поразмыслить над тем, какой поступок детей считать самым благонравным. На наш взгляд, это тот, который, учит чувству глубокого уважения к старшим, ценить дело и имя отцов. Роль мудрого Учителя несет главный герой Баласагуни – Айтолды. Мотивы гуманного воспитания озвучены им в наставлениях своему сыну. Близость нравственных идей в вопросах обучения подрастающего поколения объединяет Конфуция и Баласагуни.

Конфуций возвеличивает личность Учителя. Он сравнивает его с недостижимыми явлениями мира. Учитель Чжунни для него – это солнце и луна, а их нельзя достигнуть. Конфуций пишет: «С учителем нельзя сравниваться, как не подняться по ступеням лестницы на Небо. Если бы Учитель был главой удела или родовитого семейства, то, как говорится, начни он ставить – и стояли бы, начни вести – и шли бы, начни благотворить – и собирались бы, начни побуждать – и находились бы в гармонии. Его при жизни прославляли бы, а после смерти стали бы оплакивать. Как можно с ним сравниться?».

В мыслях Конфуция представлена вся суть человека, управляющего народом. Именно искусство управления характеризует место Учителя в обществе, идеализирует его профессию. Факты древней истории свидетельствуют, что два рода профессиональной деятельности были важны для общества. *Это правитель и учитель.* Вот почему в трудах Конфуция эти фигуры занимают главенствующее место. Не менее отчетливо выделяются правитель и наставник в наследии Баласагуни. Это народные воспитатели, люди, указывающие Путь к счастью. Они возвышаются над всем обществом.

На протяжении всей поэмы «Кутадгу билиг» автор Баласагуни воспевает гимн человечности. Китайский мудрец посвящает этому вопросу целые трактаты суждений. Человечность для Конфуция – это гимн пяти достоинств: почтительности, великодушия, правдивости, сметливости, доброты.

Общность мировоззрений выдающихся мыслителей Востока отчетливо прослеживается в отношении к *знаниям*. Рассуждения в этом русле можно назвать вершиной их творческого гения. Конфуций перечисляет шесть достоинств, переходящих в шесть заблуждений, если избегать знаний и не учиться: когда стремятся к человечности, но не хотят учиться, то это заблуждение приносит вред. Умственные способности, открытость и прямота, отважность и непреклонность могут привести к заблуждению, если их не развивать, не направлять в благое русло. Только знаниями велик человек. К

этим выводам можно прийти на основе анализа гуманистических воззрений Конфуция и Баласагуни.

Таким образом, гуманистические принципы свойственны как для эпохи Конфуция, так и для эпохи аль-Фараби, Ибн Сины и Баласагуни. Несмотря на расстояние времени, протяженностью в тысячи лет, мысли мудрецов – то объединительное звено, что духовно облагораживает и роднит их а, вместе с этим, их народ. С течением времени происходят существенные изменения в области воспитания и обучения любого народа. Однако гуманные принципы преобразования личности никогда не исчерпывают себя и являются ценными для любых этнических сообществ. В этом кроется одна из особенных сторон гуманистической педагогики.

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