

Analytrics

**THE INTERNATIONAL HANDBOOK OF
CULTURES OF EDUCATION POLICY
COMPARATIVE INTERNATIONAL ISSUES IN
POLICY-OUTCOME RELATIONSHIPS**

VOLUME ONE

Béatrice Boufoy-Bastick

**ACHIEVEMENT WITH FAMILY &
COMMUNITY INVOLVEMENT**

**The International Handbook of Cultures of
Education Policy (Volume One)**

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**The International Handbook of Cultures of
Education Policy (Volume One): Comparative
International Issues in Policy-Outcome
Relationships – Achievement with Family
and Community Involvement**

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Contents

International Board of Associate Editors	ii
Contributing Authors.....	xv
Structure and accessibility of Handbook	xix
Glossary of Culturometric terms used	xxi
Preface.....	xxv

Volume One

Section 1	1
Policy Meanings and Uses of Achievement	
Chapter 1	3
Gender Polemics, Achievement and the Policy-Research Gap: The Misalignment and Alignment of Stakeholder Positionalities Within a Global Education Policy Field and a Context of Neoliberal Governance <i>Wayne J. Martino & Goli Rezai-Rashti</i>	
Chapter 2	39
Armenian Higher Education Developments: Issues, Challenges and Opportunities <i>Kristine A. Antonyan</i>	
Chapter 3	59
How to Rebuild a Secondary School: Space, Knowledge and Education <i>Joana Marques, Luisa Veloso & João Sebastião</i>	

Chapter 4 **103**
Across and Within-School Variation in New Zealand Secondary Schools
Camilla Highfield

Chapter 5 **121**
Rethinking School Readiness and Transition Policy and Practice in Early Childhood Education (ECE): A Whole Schooling Framework
Lara Fridani & Joseph Seyram Agbenyega

Chapter 6 **155**
Building Local Networking in Education? Decision-Makers’ Discourses on School Achievement and Dropout in Portugal
Helena C. Araújo, Florbela Sousa, Armando Loureiro, Isabel Costa & José Portela

Chapter 7 **187**
School Achievement in Urban and Rural Areas in Croatia: Is the Quality of Education Equal for All?
Josip Burusic, Marija Sakic, Toni Babarovic & Ivan Devic

Section 2 **219**
Policy for Family Involvement for Formal Education

Chapter 8 **221**
Teenagers At-Risk of Dropping Out of High School. Parents’ and Teachers’ Views on Family Involvement
Raquel-Amaya Martínez-González, Lucía Álvarez-Blanco, & M^a Henar Pérez-Herrero

Chapter 9 **259**
Teachers’ Reflections on Parental Involvement in Emergent Literacy Development in Rwanda
Pierre Canisius Ruterana

Chapter 10	283
Home-School Agreements in England: Symbolic value and contractual relationships between school managers, parents and pupils	
<i>Howard Gibson</i>	
Chapter 11	321
Homeschooling: The Rising Parent Entitlement	
<i>Karen Freeman</i>	
Chapter 12	337
Upbringing Process Quality and Cooperative Learning in Family within Latvian Transforming Society	
<i>Dace Medne</i>	
Chapter 13	373
Parent Empowerment: Examining Parental Attitudes of School Systems	
<i>Julian Brown</i>	
Chapter 14	403
The social role of Grandparents: Values, Attitudes, Purposes and Behaviours	
<i>Giulia Cavrini & Liliana Dozza</i>	
Section 3	421
Community Involvement and Education Policy	
Chapter 15	423
Improving Schools Through Democratic Stakeholder Involvement	
<i>Martin Retzl & Roland Ernst</i>	
Chapter 16	437
The “Free” Child – Organized After School Activities as the Upbringing of a Community	
<i>Ann S. Pihlgren & Malin Rohlin</i>	

Chapter 17	477
Exercising an Ethic of Care: Mississippi School Leaders' Responses to Hurricane Katrina <i>Judith A. Gouwens & Donna Lander</i>	
Chapter 18	495
Service learning in a Croatian University: A Possibility for Effective Partnership with Community Stakeholders <i>Nives Mikelic Preradovic, Sanja Kisicek & Damir Boras</i>	
Chapter 19	521
Innovation and Cooperation Between Business and Universities: Comparative Analysis and Educational Implications <i>Cajide Val, J. & García Antelo, B.</i>	
Chapter 20	557
The Socioeconomic Impact of a HEI for a Local Economy <i>Joana Fernandes, Jorge Cunha & Pedro Oliveira</i>	
Chapter 21	577
The Higher Education Premium as a Measure of Regional Development <i>Joana Fernandes, Jorge Cunha & Pedro Oliveira</i>	

Volume Two

Section 4	595
Economic influences and Education Policy	
Chapter 22	597
Student mobility in European Higher Education Area: An Example of Equity? <i>Luisa Cerdeira & Tomás Patrocínio</i>	
Chapter 23	617
The Impact of the Brain Drain on Sub-Saharan Africa Development <i>Kingsley Banyá</i>	

Chapter 24	645
Portuguese Higher Education Student' Costs in the International Context	
<i>Luisa Cerdeira & Belmiro Cabrito</i>	
Chapter 25	669
The Competition in Higher Education as a Common Value to Increase Efficiency and Economic Growth	
<i>Valdis Rocens</i>	
Chapter 26	695
The Graduate Contribution	
<i>James Moir</i>	
Chapter 27	711
The Challenge of Change in Higher Education: Negotiating Economic Conditions, Policies and Socio-Cultural Perspectives	
<i>Patricia A. Shaw</i>	
Chapter 28	725
Celtic languages in Europe and Revitalisation Programmes: Language policies, Language Planning and Linguistic Communities	
<i>Sylvie Gagnon</i>	
Section 5	751
Meanings and Uses of Standards in Education Policy	
Chapter 29	753
Quality Assurance in Teacher Education in Flanders	
<i>Pieter-Jan Van de Velde & Floris Lammens</i>	
Chapter 30	779
Principal Accountability Policy and Stakeholder Values	
<i>Ted Zigler, Robert J. Beebe & Lisa Shoaf</i>	

Chapter 31 **803**
Values in Swedish School Inspection: Tensions and
Contradictions
Christina Segerholm

Chapter 32 **833**
Health Professions Student Admission Policy in Italy: Linking
Selection and Performance
Anna Siri

Chapter 33 **853**
Essential Aspects in Technical Teacher Education
Tiia Rüttnann & Hants Kipper

Chapter 34 **875**
Implications of the Selection Process for Ethics Instructors in
Graduate Schools of Public Administration: Failing to Achieve
Objectives
CHARLES E. Mitchell

Chapter 35 **891**
Organizational Civilization
Soudabeh Jalili & Golamreza Memarzadeh Tehran

Section 6 **911**
Governance For and Through Neoliberal Policy

Chapter 36 **913**
Implementation and Evaluation of Policy Education: conflicts
between the stakeholders
Ana Elisa Spaolonzi Queiroz Assis & José Roberto Rus Perez

Chapter 37 **931**
Governance, Mayoral Control and Urban School Improvement:
Lessons for Newark in a Climate of Conflict
Alan R. Sadovnik, Jason Barr, & Tara Davidson

Contents

Chapter 38	961
(Mis)Aligning of Values, Attitudes and Purposes of Education Reforms Across Various Stakeholders in Singapore <i>Chua, Siew Kheng Catherine</i>	
Chapter 39	983
The Role of the Local Level in the Convergence of European Educational Space: The Slovenian Case <i>Urška Štremfel & Damjan Lajh</i>	
Chapter 40	1031
The Bologna Process and Governance of Spanish Universities: The Rhetoric of Discourse and the Vacuum of Practice <i>Antonio Luzón, Miguel A. Pereyra & Mónica Torres</i>	
Chapter 41	1065
School Leadership and Special Education: Challenges, Dilemmas and Opportunities from an Australian Context <i>Philip Garner & Fiona Forbes</i>	
Chapter 42	1089
Cultural Change in Polish Schools in Challenging Urban Contexts <i>Joanna Madalińska-Michalak</i>	
References: Selected Translations	1131
Cyrillic references translated into English	1277
Subject Index	1285
Introductions to our Authors	1297
Introductions to our Associate Editors	1345

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Structure and accessibility of Handbook

Structure - Placing this book within the handbook trilogy and explaining its 2-volume structure:

This is the third handbook in the series '*International Cultures of Education*'. It is in two volumes. This is the first volume. The first volume expounds issues of Education Policy relevant to 'Achievement and the Involvement of Families and Communities', whereas the second volume addresses Education Policy concerns related to 'Economic influences, Standards and Governance'. This handbook offers an integrative approach and alternative resolutions to the international issues and concerns reported in its forty-two chapters by using a Culturometric analysis of related global and local (*glocal*) influences of neoliberal policy on education from the unifying fundamental perspective of individual and institutional Cultural Identity – its expression, promotion and survival.

The two volumes are designed to be used independently, relating commonalities of policy concerns focused within and across the three categories of policy corresponding to the sections of each volume whilst maintaining the relation of each individual chapter to the integrative Culturometric analysis and recommendations of the handbook as a whole. This has been achieved by incorporating the cumulative contents, cumulative index and fundamental integrative Culturometric exposition into each volume using simple consecutive pagination for internal referencing, whilst separating only Sections one to three comprising Chapters 1 to 21 in Volume one, from Sections four to six which comprise Chapters 22 to 42 in Volume two.

Readability – Supporting our visually impaired educationalists with hardcopy format and eVolumes for preferred reading enlargement:

The series '*International Cultures of Education*' complies with 'more-easily read font' recommendations of the National Association for Visually Handicapped. In addition to the hardcopy format available from bookshops

internationally, the series has been made freely available under Creative Commons licence to the education community from the Publisher¹ and from the Culturometric² websites as search-n-print open-access eVolumes in pdf full-colour format allowing personally preferred reading enlargement for our visually impaired educationalists.

¹www.analytrics.org/Pages/EESENOtherEventsandResources.aspx

² www.Culturometrics.org

Glossary of Culturometric terms used¹

- **Achievement in:** A Normreferenced standard, e.g. reaching some percentile in a comparative test or measure of mathematics ability in relation to a given content area – described as he/she came top in the national school-leaving exam for mathematics. Key point is that this gives relative position (1st, below average, etc.) without reference to what the person can do.
- **Achievement of:** A Criterion-referenced standard, e.g. acquiring the abilities to be mathematician in relation to a given content area – described as he/she can do this and that content. Gives evidence of what the person can do without comparing them to what others can do.
- **Authentic Cultural Identity:** Consistency of values in a context (see Validity).
- **Communication:** A display of behaviour that implies Cultural Identity - values in context.
- **Compliance standards:** These are considered as behaviours operationalizing policy that affirm cultural identity.
- **Cultural Identity:** Values in context. Note the recursion in that values also define context.
- **Elite education:** Emphasis on processes with applications to a wide and varied choice of ideal cultural identities, e.g. process curriculum might contain: critical evaluation of classical music, mathematical philosophical theological or other aesthetic fields, and of literary sources in Sanskrit Hebrew Latin and Greek - as opposed to training in market-determined employment skills.
- **Employee-ment:** The Cultural Identity of an employee. The word was coined to distinguish it from the less specific 'employment' that can reference employees, employers or a generalised state (e.g. demographics of employment figures/sector).

¹ Our glossary is placed here to help readers create useful mind-sets for approaching the following preface.

- **Equality in Education:** Each person's access to education results in the meritocratic achievement of their potential ideal cultural identity – see '*Merit and Meritocracy*'
- Ideal-type Cultural Identity: Ideal values in context.
- **Merit and Meritocracy:** In contrast to the neoliberal unitary use e.g. merit = intelligence + effort, Culturometric promotes a diversity of merit; where each person's choice to find or develop their chosen area of potential, and bring it to a level of merit that can contribute to society, receives equally support and recognition – not necessarily equally from each individual but equally from society as a whole.
- **Neoliberal education policy:** Promoting only the identity of Employee-ment – the student as an ideal employee. Policy uses only fiscal indicators, e.g. Cost-benefit analysis. The two main policy processes are jointly maximising competition and minimising cost.
- **Neoliberal subterfuge:** A method of discourse that promotes monetarist processes as though they are serving all community values. Technically, a spin technique promoting policy acceptance by aggregating statistics to hide contradictory contexts and by using Milton model language structures encouraging non-neoliberal stakeholders to imply reference to contexts of their own which align with the policy values - *Caveat emptor*.
- **Policy:** The promotion of an ideal-type cultural identity.
- **Standards:** see Compliance standards - behaviours that affirm cultural identity.
- **Traditional education policy:** Promoting process and content offering wide choice of Cultural Identities. The immediate precursor of current neoliberal education policy.
- **Validity:** Validity is a truth (not assessed with a 0/1 truth value but with a probabilistic fuzzy logic). Truth is operationally measured by the consistency of values in a context – an Authentic Cultural Identity. When a person experiences an Authentic Cultural Identity, all their

values and their representative behaviours are consistent, there is no dissonance so they feel good about themselves.

PREFACE

The International handbook of cultures of Education Policy: Comparative international issues of policy-outcome relationships

Introduction

This is the third and last handbook in the series of "*Cultures of Education*". Each handbook of the trilogy focuses on a Culturometric framing of common international issues in cultures of education. Each handbook is self-contained. However, the three tomes read in conjunction develop Culturometric appreciation to give a wider more complete understanding of successful Culturometric applications across world cultures of education (Boufoy-Bastick, 2011, 2012).

This third handbook is in part an international response to the devastating effects of Neoliberal policies on government-controlled mass education around the world. Education builds Cultural Identities - the rich possibilities of who we can be. The problem in education, put simply, is Neoliberal policies on government-controlled mass education around the world are diminishing the diversity of cultural Identities both of educationists and of students. The performativity of neoliberal enculturation makes immoral neoliberal academics from traditional educators. The pedagogy of neoliberal enculturation reduces the infinite potential of students to only that of 'Employee-ment' - the Cultural Identity of an ideal

employee. Further, the neoliberal education policies, which privilege only monetary indicators for maximising competition whilst minimising cost, have overall effects of reducing educational resources, reducing employment and greatly increasing the burdens of poverty.

The six sections of this handbook show local national detailed problems against the backdrop of globalisation policy processes such as mobility under 'Bologna Declaration (1999), corporatisation of education and international competition for cheapest employees. From its Culturometric perspective of promoting personal and institutional choice of cultural identity, and security of that cultural identity (Boufoy-Bastick, 2013a, p. 5), the chapters of the book show how the reported themes of (i) exclusive monetary indicators of Neoliberal processes, such as globally maximising competition whilst minimising cost and cost/benefit decision analysis and (ii) Neoliberal controls of education through policy spin, recursive compliance standards and new governance structures distancing policy-makers from democratic resource-accountability, all intentionally disenfranchise policy-users and effectively silence other community values and cultural identities.

1. Neoliberal education policy

As we shall observe in the chapters of this book, the outcomes of neoliberal policy on education are fundamental, complex, wide reaching and disastrous. A typical disgruntled perception from the chalkboard is given by UK Professor of Education Policy Dave Hill: "The current neoliberal project, the latest stage of the capitalist project, is to reshape the public's understanding of the purposes of public institutions and apparatuses, such as schools, universities, libraries. In schools, intensive testing of pre-designed curricula (high stakes testing) and accountability

schemes (such as the 'failing schools' and regular inspection regime that somehow only penalizes working class schools) are aimed at restoring schools (and further education and universities) to what dominant elites – the capitalist class – perceive to be their "traditional role" of producing passive worker/citizens with just enough skills to render themselves useful to the demands of capital." (Hill, 2006, p.11).

For now, the following brief descriptions will give an adequate introduction. Neo-liberalism is a "set of practices that are organized around a certain imagination of the 'market' as a basis for 'the universalisation of market-based social relations, with the corresponding penetration in almost every single aspect of our lives of the discourse and/or practice of commodification, capital-accumulation and profit-making" (Carvalho & Rodrigues, 2006). The role of a neoliberal government is to create or enhance the social conditions for a market including the employees to maintain the market– "neo-liberalism has come to represent a positive conception of the state's role in creating the appropriate market by providing the conditions, laws and institutions necessary for its operation.... In neo-liberalism the state seeks to create an individual who is an enterprising and competitive entrepreneur." (Olssen,1996, p. 340).

"Neoliberal and neoconservative movements are aggressively altering our jobs and our schools. Their effects are increasingly dangerous." (Apple, 2006, p. 26).

"The ascendancy of neoliberalism and the associated discourses of 'new public management', during the 1980s and 1990s has produced a fundamental shift in the way universities and other institutions of higher education have defined and justified their institutional

existence. The traditional professional culture of open intellectual enquiry and debate has been replaced with a (*sic*) institutional stress on performativity, as evidenced by the emergence of an emphasis on measured outputs: on strategic planning, performance indicators, quality assurance measures and academic audits." (Olssen & Peters, 2005, p.313).

1.1 Global influence of neoliberalism on education

The global influence of neoliberalism on education is so vast that it is difficult to comprehend our place in it and our possible influences on it. We have to come to terms with much more than our interaction with students, ideas and our particular local and national institutions. We need to be aware of Governments spread of policy through outsourcing to the private sector "private providers in education policy ... through advice, consultation, evaluation, philanthropy, partnerships, representation, programme delivery and other outsourcing ... Here the private sector is the instrument of a form of re-colonisation." (Ball, 2009. p. 95). We need to be aware that international corporatisation of universities through investments and takeovers by other large business - News companies and Industrial Parks own universities. (Ball, 2012. pp. 22-23). As a set of policy values, neoliberalism has tendrillous international influencing network. Examples are neoliberal Transnational Advocacy Networks (TANs). These are 'communicative structures' organised around the 'shared values' of their members (Keck & Sikkink, 1998). Another example is the Atlas Economic Research Foundation (www.atlasnetwork.org) with a \$9 million budget (2011)

<http://www.charitynavigator.org/index.cfm?bay=search.summary&orgid=10435#.Up31vuIcbwg>

"This site compiles information on nearly 500 think tanks worldwide who are sympathetic to the values of a free society' (Atlas website). These think tanks are committed to the dissemination of neo-liberal ideas." (Ball, S.J. p.490) The Atlas Network promotes monetarism under the neoliberal obfuscations of 'Freedom' and 'Liberty' "The Atlas Economic Research Foundation is a non-profit organization connecting a global network of free market organizations and individuals to the ideas and resources needed to advance the cause of liberty." (Dyble, 2011, p. ii). Global neoliberalism has made education into a worldwide business with an estimated value of \$400 billion (Ball, 2012, p. 20). Neoliberalism serves the values of Elite oligarchy. Elite values are described in Section 4.6 by Elite Theory (Dye, 2000; Gonzalez, 2012; Putnam, 1977; Spencer, 2006) and differ markedly from the values of Traditional education (Banks, 2001, 2008; Fagermoen,1997; Kogan, 2000); Nixon,1996). The 'inevitability' of oligarchy is described by Michels' (1915) 'iron rule of oligarchy'. "Michels described as the 'iron rule of oligarchy' – the inevitable takeover of a democratic republic by a small oligarchy, a plutocracy committed to advancing the interests of the ruling class and to preserve their power in service of this class and themselves." (Petras & Veltmeyer, 2012, p. 229). Neoliberal policies are creating globally large impoverished masses. Writing in 1959 Seymour Lipset argued in his classic paper "A society divided between a large impoverished mass and a small favored elite would result either in oligarchy (dictatorial rule of the small upper stratum) or in tyranny (popularly based dictatorship)." (Lipset, 1959, p. 75)

However, just as the complex variety and multifarious outcome patterns from games of chance often belie the simplicity of the processes which generate them – the drawing of lottery numbers, the roll of dice or the

spin of the roulette wheel - so the root, growth and outcomes of neoliberal policy in education are more simply understood from the Culturometric perspectives on identity.

2. Culturometric perspective: Understanding and applying the psycho-social foundations

2.1 Need for Culturometric perspective on neoliberal education policy

Culturometrics brings a new and needed perspective that enables educationists to relate at a personal level to the different global exigencies of neoliberalism: "The discourses and practices of neoliberalism, including government policies for education and training, public debates regarding standards and changed funding regimes, have been at work on and in schools in capitalist societies since at least the 1980s. Yet we have been hard pressed to say what neoliberalism is, where it comes from and how it works on us and through us to establish the new moral order of schools and schooling, and to produce the new student/subject who is appropriate to (and appropriated by) the neoliberal economy." (Davies & Bansel, 2007, p. 247).

In this book, we see current global problems and solutions to Education Policy from a Culturometric perspective. That perspective is different, very different from the positivist research paradigm that has grown from the Anglophone statistical tradition of the last 90 or so years. That tradition, with its problematic assumptions for the human sciences, has come to dominate and objectify our thinking, our morality and our humanity. It has led to and encouraged acceptance and 'scientific' approval of policies and practices that the collective contributions to this book show are undermining the bulwark of traditional educational systems on a global scale.

2.2 Culturometrics: A humanistic research paradigm ensuring humanistic policy outcomes

Culturometrics uses a humanistic research paradigm that follows in the steps of Weber and Maslow (Boufooy-Bastick, 2013b). It gives recognition to the most natural, fundamental and encompassing human ability we have of generating possible views of the world. When we put ourselves in the place of another person, animal or even object and intuitively know 'how we would feel, what we would do, in their situation' we generate testable hypothesis founded on our humanity. From that point on in the development of our grand plans or the mundane minutiae of our lives we cannot retract back into barbarism. The fundamental anthropomorphism of empathising with the object and projecting our empathic feelings into the object remains the ultimate visceral validity check for ethical action and meaning – we relate the other to ourselves. We imbue the object with values, the values we would have if we were the object in that situation and we expect the behaviour of the object to promote those values – because 'that's what we would do if we were them'. Thus we give objects cultural identities and can give them meanings from affinity to rejection in relation to aligning or opposing our own cultural identities. The objects can be animate or inanimate, people, animals, effects, institutions and even constructs and abstract ideas (Boufooy-Bastick, 2007). In this book we will come across policy problems of universities trying to adopt corporate identities. We shall see governments who create schools that try to 'create children in their own image' rather than to the diverse identities of their parent communities (Akerlof, & Kranton, 2002). If you are ever in doubt about how to proceed in Culturometrics then return to these basic tenets and be guided by them. This is the rich subjectivity and intersubjectivity of our lives. A relevance to the neoliberal forced restructuring of our diverse cultural identities is .. "To

put it simply, to the extent that neoliberal governmentalities have become increasingly focused upon the production of subjectivity, it is logical that we think about subjectivity as a site of struggle and resistance.” (Ball & Olmedo, 2013, p. 85). However, we need measures and methods that mediate these inter-subjectivities and follow laws of logic to replace inappropriate assumptions in current research methods so that we can use our otherwise well-developed ‘scientific’ methods towards more humane outcomes. To this end, Culturometrics operational defines Cultural Identity recursively as ‘values in context’, where the values in the context also define the context. Culturometrics develops and collects its methods using the criterion of self-norming to represent self-reference. It uses its growing family of methods to analyse data specifically structured to retain ‘values in context’ which then represent subjects’ communications of their identities. Thus Culturometrics objectively measures and compares the strengths of cultural identities.

3. Culturometric administration of education management and policy

In tome two of this series ‘*The International Handbook of Cultures of Professional Development for Teachers*’ we introduced the embedded ability structure of Teachers’ professional Development which formalised and expanded on the Reflections in volume one.

This tome extends and embeds that professional development model within the additional layer of management and policy concepts for administrative professionals in the international management of education policy. This is simply illustrated in figure 2.

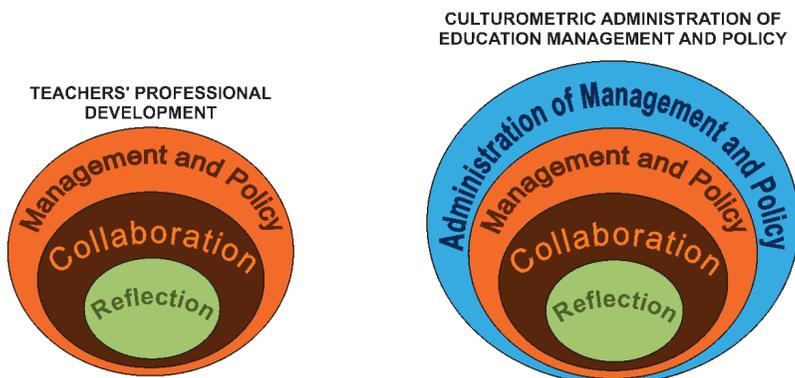


Figure 1: From Professional Development to Administration of Management and Policy

The administrative ability-set of this last shell is primarily comprised of Cultural Identity issues in the six areas of Achievement, Family Involvement, Community Involvement, Economic influences, Standards and Governance. The contributions to this book have been selected as prime examples of international Cultural Identity issues in each of these constituent areas for understanding the Administration of Policy and Management for education.

The reader will thus benefit from knowing these extended Culturometric concepts – tools of thought – to more fully understand and appreciate the international policy examples in the following sections of this book. These concepts build on the glossary of terms on pages xxi to xxiii

4. From Individual Cultural Identity to an Institution's Ideal-type of Cultural Identity: From the 'I Am' to the 'We Are'

Individual cultural identity – yours and mine, and that of others, is thought of as their 'values in context' (Hitlin, 2003). We have an identity for each context – for example, we have values for interacting with children, which is one context and values for

interacting with adults, which is another context (Boufooy-Bastick, 2010). The difference in these two sets of values is what defines the two different contexts, and defines our two different identities, as being different. In any given context all the values are consistent. Where we have inconsistent values we will have more than one context (Boufooy-Bastick, 2010). This is because a context is defined by its consistency of values. Foucault used the following two contexts 'speaking at a political meeting' and 'speaking within a sexual relationship' to illustrate two possible component cultural identities within the same person. Foucault uses the term 'subject' where Culturometrics uses the more definitive term 'cultural identity'.

"You do not have the same type of relationship to yourself when you constitute yourself as a political subject who goes to vote or speaks at a meeting and when you are seeking to fulfil your desires in a sexual relationship. Undoubtedly there are relationships and interferences between these different forms of the subject; but we are not dealing with the same type of subject. In each case, one plays, one establishes a different type of relationship to oneself. And it is precisely the historical constitution of these various forms of the subject in relation to the games of truth which interests me." (Foucault, 1997a, pp. 290–291)

4.1 Hierarchical structure of cultural identity: Remembering to put context before values

Our identities are hierarchically structured on different levels like an organisational chart (Boufooy-Bastick, 2013a, p. 65). All the values in the contexts on any level are part of a higher order identity corresponding to a more inclusive context. Values are only consistent within a context and not necessarily consistent between contexts on the same level or between levels. Hence, our values can be inconsistent between contexts. This is just a formalisation of

'compartmentalisation' (Bertone, & Leahy, 2001; Nyström, 2009; Pratt, & Foreman, 2000; Roccas, & Brewer, 2002). Our values do not influence others directly. What is overtly important in our social world is our behaviour. It is through our behaviour that our values influence others.

In Culturometrics, all behaviour is an affirmation of our cultural identity - our values in context. Further, and fundamentally deep, the purpose of all behaviour is to affirm cultural identity. However, when we interact with others there is a 'slippage' in the interpretation of our behaviour. The specific behaviour we exhibit is 'chosen' because, to us, it symbolises our 'values in context'. As our values can be inconsistent between contexts, so then will be the behaviours we choose to represent our values. This shows the importance to communication of first confirming that we are in the same context - all on the same page. However, we have a tendency to just assume we are in the same context and give priority to the ascertaining values through interpretation of behaviour. Prioritising values above context in communication is a primary cause of misunderstanding and is well illustrated by the structure of many jokes. 1st Businessman 'Last year I lost everything in a fire. Fortunately I was fully insured'. 2nd Businessman 'Last year I lost everything in a flood. Fortunately I was fully insured'. 1st Businessman "A flood! How do you start a flood?"

Many chapters in this book report the cognitive dissonance and demotivation traditional educators feel when forced to comply with neoliberal policy demands - the 'performativity' of neoliberalism. The hierarchical structure of cultural identity shows you can resolve the inconsistencies of identity, which are felt as dissonance, by compartmentalising - that is by taking one side or the other. Research on actions that follows

dissonance shows that outcome identity can be decided by forced behaviours consistent with the values of the required identity outcome (Bouie Jr, 2013; Harmon-Jones., Amodio, & Harmon-Jones, 2009; Harmon-Jones, & Harmon-Jones, 2002 & Henkel, 2005). Or we can resolve this dissonance by generalising to a higher level identity – where ‘in the grand scheme of things’, ‘the end justifies the means’ and ‘everything will come out in the wash’. This is most relevant to how neoliberal performativity forces traditional educationists to reconstruct themselves as neoliberal academics.

Culturometrics defines validity as a truth which it operationalizes as the consistency of values in a context (Boufoy-Bastick, 2003) – an Authentic Cultural Identity. When you have an Authentic Cultural Identity, all your values and their representative behaviours are consistent, there is no dissonance so you feel good about yourself. With relevance to the ‘value ethics’ of neoliberal education policy, this is why Culturometrics contends that policy-makers cannot revert to barbarism – feeling good about doing bad things - if just one humanistic value is part of each of their authentic component identities.

4.2 Communicating policy is promoting identity

Policy is a statement of behaviours we intend to promote our identity – values in context. The policy for public acceptance is open to different interpretations of context. However, the operational policy that follows public acceptance defines the contexts of the values more precisely with indicators of the behaviours and standards and standards of achievement on those indicators. Initially, when communicating our values in context with behaviours we assume represent our values we are likely to find that our interpretation of our behaviour that we assume represents our specific values will not be shared exactly by another person –

not all readers will have realised the different contexts of 'insurance' for the Businessmen above. Our interpretation of our behaviour will be shared more closely by those who have shared our enculturation. Shared interpretation, approval of the values represented by behaviour, is perceived as affirmation of cultural identity by both parties – rapport. However, even if the two parties do share the same invisible 'values in context' a different interpretation of the behaviour as signifying inappropriate values will not align 'values in context' and could be so differently interpreted as to seem to refute the other person's identity altogether. Values represented by our interpretations of manners and customs, even the interpretations of dialects, are used to judge the affinity of 'values in context' and thus the joint affirmation of cultural identity. These identity principles of communication are used for policy acceptance in that the policy must be interpreted to affirm our values in context.

4.3 Ideal-types of Cultural Identity

We mentioned above that the purpose of all behaviour is to affirm cultural identity, or more precisely to affirm ideal-type cultural identity, communicating to oneself – as in solitary behaviour – or communicating to others as with social behaviour. We are motivated to be social according to the enhancement in the affirmation of our ideal-type cultural identity we expect and experience from others. Some of us are more 'self-sufficient' and less socially dependent on valuing the affirmations of others. For those of us who value more the affirmation of others there is much 'self-respect' and 'identity security' to be gained in seeking out and joining with others for mutual affirmation of common ideal-type cultural identity. We prize our private cultural identity less than our ideal self. The difference can motivate self-development or be hidden as a supposed source of stigma. This

inhibition in acknowledging our private identities in favour of the group ideal-type - for which we are rewarded with enhanced 'self-respect', 'identity security' and the rewards of multiple social affirmation - goes some way to explaining the developed questions of Solomon Asch, Stanley Milgram and Phillip Zimbardo as the personal worth of 'security of identity' in return for 'obedience to authority' and perhaps why academics change behaviour when 'promoted' to administration. It does explain the self-interest members of a cultural group - a government, a school, a family - have in promoting their public ideal-type of cultural identity. As we shall see in Sections 2 and 3, it also explains lack of family and community involvement in the neoliberal schools of neoliberal governments.

4.4 Influence of language and trust on policy acceptance

Precision of communication and need to trust the communicator greatly influence the interpretation of the behaviour. When we don't understand the values in context symbolised by a communication, we 'reflect' upon our own contexts to choose one that either affirms our identity or refutes it. In Neuro-linguistic Programming this meaning-making process is called 'trans-derivational search'. This is of relevance where the communicator is a policy-maker and the other party is the policy-user. In particular, if we trust or need to trust the communicator/policy-maker then we find a context for which our interpretation aligns with our values and so we interpret the policy as affirming our identity and accept it. For example, a policy statement might be 'We need to streamline the curriculum so that our children spend their class-time in effective learning'. At some level of identity all stakeholders can find a context that agrees with the values symbolised by this intentionally imprecise statement. However, if the policy-maker is not

trusted, then the stakeholders will find contexts where the interpretation refutes their values e.g. what if the policy-makers decide to cut areas of the curriculum that I value and what do they mean by the ominous term 'effective learning'. This is the realm of the 'Spin doctor', using precisely vague 'Milton Model' language (Tompkins, & Lawley, 1997) to build trust and acceptance and to ensure that contrary contexts of Policy-users are censored.

4.5 Compliancy standards are policy truth, the behaviours affirming Cultural Identity: International realisation and protest

There comes a rude awakening for policy-users when the compliance standards are put in place. These define precise behaviours that users cannot align with the contexts they inferred from the ambiguous policy. The behaviours are Attainment indicators for compliance standards. They are enforced by rewarding or withholding allocation of resources under the policy provision. John Sargis gives examples from neoliberal education policy in the USA, including ... "Another trap in NCLB is a military recruitment policy. Section 9528 requires high schools to give Type I student information which is: name, address and telephone number of each student to the Pentagon. The Pentagon then sends this information to local military recruiters. If a high school refuses to hand over this information the school will lose its federal funding." (Sargis, 2005, p. 5)

Policy-makers get to define the attainment indicators, both the aggregated statistics defining the label, the measures allowed for the 'evidence base' of those statistics and the cut-point levels for success. It is at this 'eye-opening' stage there might be user dissent; Google 'protest against education' to see the latest international protests and dissents, millions of them.

- Hundreds of Teachers Protest against Portugal's Gov't-imposed Qualifying Exam (2013-12-06, Portugal)
- Teachers protest against district education authorities (November 29, 2013, Punjab)
- Protests widen against Obama-backed Common Core education reforms (November 17, 2013, Washington)
- 248 LI principals join protest against over-testing (November 16, 2013, New York)
- Violence Against Brazil Protesters Puts Spotlight on Education as a Constitutional Right (Nov 14, 2013, Rio De Janeiro)
- OLME Unionists Protest Outside Ministry of Education (December 5, 2013, Greece)
- Teachers across NM plan protests against reforms (New Mexico, 11/19/2013)
- Concern over cutbacks to education has sparked a strike by students across Italy (15 November 2013, Italy)
- Turkish teachers protest against the government's education and economic policies (November 24, 2013, Ankara)
- 1000s teachers protest education reform in Paris (Dec 06, 2013, France)
- Kindergarten teachers to protest around NZ today (Dec 6, 2013, New Zealand)
- Teachers rally against education cuts (27 November, 2013, Darwin)

Protesters take to the streets because educational governance systems are changed to exclude the voice of their values.



Figure 2: “Hundreds of Spanish people have staged a protest in the capital of Madrid against the government’s recent controversial educational changes and cuts to education spending.”

Source: <http://www.davidicke.com/headlines/spaniards-protest-against-education-cuts/>

The discontent of policy users is controlled by inserting additional levels of committees in the ‘negotiating’ structure and by narrowing the resource accountability of the policy-makers to the occasional election vote. The tall hierarchies of negotiating committees are there to protect policy-makers from the humanistic values of policy-users so that only the fiscal language of neoliberal decision making can enter negotiations; “this language of neo-liberalism is unable to convey any human emotion, including the most basic ones such as happiness, greed, envy, love or lust” (Soudien, Apple, & Slaughter, 2013, p. 455).

Two policy lessons from Culturometrics are therefore to never accept policy without standards and to maintain a flat negotiating hierarchy.

5. Unmaking the language of thought the language of neoliberal policy

We have seen the power of policy language in the acceptance of them as one of us, as like me. But language also anchors our thoughts and their feelings – it makes them real. So our language shapes our reality and thus whoever shapes our language shapes us (Boufoyo-Bastick, 2009).

The usage of neoliberal language and its related terms has increased a-thousand fold since the 1980's (Boas, & Gans-Morse, 2009). Neoliberal policy methods of monetisation are now so acceptable that they pervade common language. E.g. people are sold on an idea rather than being persuaded; what was a summary is now 'the bottom line', students are 'customers' and teaching is no longer a vocation but teachers are 'in the business of' education. Kathleen Lynch observes "Student and staff idealism to work in the service of humanity is seriously diminished as universities operate as entrepreneurial, purely competitive business-oriented corporations" (Lynch, 2006 p. 10); and as Panayota Gounari (2006) argues in 'Contesting the Cynicism of Neoliberal Discourse: Moving Towards a Language of Possibility'

"By using words such as "interested parties" or "consumers," instead of "people" or maybe "citizens," neoliberalism conveniently positions subjectivities in an absolute apathy and inertia regarding any political project. Being a "consumer" already presupposes that you have a range of options and that you have the means to consume. It does not presuppose that you can question your very identity as a consumer, nor that this very identity really strips you of any form of agency that would call into question this reductionist notion of citizenship." (p.81)

Within the mindset of 'cost benefit analysis' people are now prepared to make and accept decisions on the quality of people's lives, even on saving lives based on the cost of equipment and prepared to accept the sickening idea of the dollar value of their lives. From 1980-2000 Feminists realised the influence of masculine language, identified it and successfully fought against it. e.g. "[M]ale-based generics are another indicator-and, more importantly, a reinforcer-of a system in which "man" in the abstract and men in the flesh are privileged over women" (Kleinman, 2000, p. 6). Over the same period monetarist language has infected of minds. This series of handbooks makes some efforts for humanists to restrain and contain the influence of monetarist language on our thinking about education.

5.1 Meanings of 'merit' and expressions of 'equity'

Neoliberal education policy creates greater social division by rewarding 'Merit'. In this neoliberal usage 'Merit' is given the eugenic meaning of inherited intelligence plus effort as in Michael Young's satirical book 'The rise of the meritocracy: An essay on Education and Equality' "Intelligence and effort together make up merit ($I + E = M$)."

(Young, 1994, p. 94). Culturometrics uses the term 'merit' in its definition of 'equality'. However, it is not used in the unitary sense of everyone valuing one human attribute such as 'Intelligence'. Jo Littler (2013) gives an interesting account of the neoliberal takeover of this word in her 'Meritocracy as Plutocracy: The Marketising of 'Equality' Under Neoliberalism' and she uses the term in this unitary sense; "...whilst 'meritocracy' is valued for its ability to dismantle inherited privilege, it is also damned for its power to create new, unfair social divisions. The fictional 'Chelsea Manifesto' is the clearest expression of an alternative to both, with its often powerful arguments

for equality, for valuing 'kindness and courage, sympathy and generosity' over narrow conceptions of intelligence.."(Littler, 2013, p. 58). Like the 'Chelsea Manifesto' Culturometrics promotes valuing 'kindness and courage, sympathy and generosity' and the infinite diversity of other human attributes that brought to merit can enrich society. Jo Littler (2013) concludes her development of the neoliberal use of the 'merit' with a more social meaning of the word:

"Through neoliberalism meritocracy has become an alibi for plutocracy, or government by a wealthy elite. It has become a key ideological term in the reproduction of neoliberal culture in Britain. It has done so by seizing the idea, practice and discourse of greater social equality which emerged in the first half of the twentieth century and marketising it. Meritocracy, as a potent blend of an essentialised notion of 'talent', competitive individualism and belief in social mobility, is mobilised to both disguise and gain consent for the economic inequalities wrought through neoliberalism. However, at the same time, such discourse is neither inevitable nor consistent. It requires actively reinforcing and reproducing and can be augmented and shaped in a number of different places and spaces. The alternative to plutocracy-as-meritocracy is a more plural understanding of 'merit' - which considers 'merit' on a collective and not a purely individual basis - alongside mutual and co-operative forms of social reproduction which create greater parity in wealth, opportunity, care and provision" (Littler, 2013, p. 69).

In contrast to this unitary use, Culturometrics actively promotes a diversity of merit; where each person's choice to find or develop their chosen area of potential receives equally support and recognition - not necessarily equally from each individual but equally from society as a whole. As such Culturometric's use of 'merit' is more aligned with Daniel Bell's (1972)

vision, not in opposition to social democracy, but of multiple individual and group merits contributing to society in a sea of social sufficiency.

5.2 Gap-talk vs. Equity: Aggregated statistics, Nominalisation and the flattening out of diversity

Gap-talk is a tool of recuperative education policy. Gap-talk compares two or more nominalised groups on an achievement indicator under the equity assumption that they should have equal achievements and then proposes resource dispersions to 'close the gap'. Examples are the attainment gaps between aggregated demographic groups and some assumed educationally dependent advantages such as male and female student results in STEM subjects, the gaps between ethnic groups in IQ tests and their assumed education dependent attainments such as employment remuneration and quality of life indicators (crime statistics, devotes, specific illnesses, age of first pregnancy, etc., etc.). In this process there are many definitions conveniently constructed and labelled under policy-maker control that can be optimised for minimax based policies to minimise resource allocation. In this value-laundering cost-cutting process the needs of specific cultural groups are hidden under aggregate labels and the actual causes of the gaps are obfuscated.

Gap-talk of attainment differences between schools – under-performing schools – particularly affords “opportunities for replacement and/or remediation of ‘failing’ or ‘weak’ public sector institutions. The education businesses can sell school improvement – offering schools ways of accommodating themselves to the demands of state performativity and the production of new organisational identities.” (Ball, 2009, p. 85). Indeed, the role of the neoliberal government is to prepare the public education sector for financial rape. “The state acts as a ‘commodifying

agent' rendering education into commodity and contractable forms, and 'recalibrating institutions' in an attempt to make them homological with the firm and amenable to the processes of the 'market form' thus creating the necessary economic and extra-economic conditions within the public sector within which business can operate."(Ball, 2009, p. 97).

5.3 Contesting neoliberal policy definitions of gap-talk

Neoliberal policy definitions of gap-talk can be contested by different cultural groups. There are many points in the policy-making and policy implementation where the policy makers can privilege their values in context over those of the policy users. Are the indicators of achievement valid and are the measures of those indicators valid. That is, do the behaviours chosen for indicators and the behaviours chosen as measures of those indicators represent the values in relevant context of the policy-users to which they are being applied or are they promoting the values in a different context of the policy-makers. A major example is the narrow curriculum content for enculturation of employement, whose measurement by ranked national tests results – composed mostly of cheap machine-scanned and statistically manipulated shaded multiple response-options - is used as an achievement gap outcome of what the public expect of students' education, of teachers' ability, of effectiveness of school policy and even of national competitiveness!

The simple visceral validity-test of these multifarious machinations of policy is simply how they affirm our different ideal-types of cultural identity – our ideal values in all the important contexts of our lives .

Aggregate 'chunking' is acceptable when differences are shown not to matter. We use profiles when they do matter – a mundane example is when we choose to use students' Grade point averages or their transcript profiles. Question the 'values in context' promoted by the policy definitions of 'Equity': What groups are being compared – do any of the groups comprise relevantly dissimilar cultural identities whose values need to be considered separately; What is the achievement indicator that is being equalised - does it represent relevant values of the individuals in the groups compared; Is Equity an equality of opportunity/access to an equally valued resources or an equality of outcomes that are equally sort. We note that 'outcome' is a product' but 'access' is process so they have no commonality for such a comparison. It is a Humanistic Culturometric intention that education gives equal access to the most personally valued outcomes.

The most valued Culturometric outcome of education is 'achievement of one's potential ideal cultural identity'. Hence, the Culturometric pursuit of Equity for individuals – which resolves the issue of group representation and labelling – is that each person's access to education results in the meritocratic achievement of their potential ideal cultural identity. However, neoliberal policy acts to reduce the options of what we can be. It acts by reducing public education resources to deliver a narrow value curriculum of employment skills – narrowing the diverse potential identities of students to 'employee-ment'. Through neoliberal policy requirements of 'performativity' it reconstructs the diverse cultural identities of educators to that of neoliberal academics. Later we uncover the identity reconstructions of academics. First we look at 'employee-ment' – the policy produced student.

6. Neoliberal enculturation of 'Employee-ment'

6.1 The policy produced student worker

'Employment' is a very general term that can reference employees, employers or general states and conditions such as demographics of employment and employment figures by different sectors. We use the term 'Employee-ment' to mean the cultural identity of an employee – values in the context of an employment. Local and global employers can define the ideal-type of an employee-ment cultural identity that would fit their requirements. Neoliberal education – including curriculum content – is narrowed to the 'best practice' curricular concepts for preparing students for hoped-for employment (Ambigapathy, & Aniswal, 2005; De Weert, 1994; Journell, 2011) by constructing their cultural identities to match market determined employment contexts. Often the possibilities of who they can be is highly restricted by this enculturation – as with Vreyens' and Shaker's example of preparing market-ready graduates by adapting curriculum to meet the agriculture employment market in Egypt' (Vreyens, & Shaker, 2005). The immediate short-term market predictions are not useful for objectives of 'life-long learning' and do not offer wider values that potentiate diversity. Yet even where there is low or no future hope for employment young children are still constructed for employment which is justified by relabeling the lack of employment as 'self-employment' (Makau, 1985). PISA is one of the diversity-flattening standard assessments of national compliance to the employee-ment curriculum. On a global scale, Heinz-Dieter Meyer and Aaron Benavot (2013) remark in their policy book on the emergence of global educational governance, that the standardising curriculum assessment tool PISA is simply 'hitching schools more tightly to the bandwagon of economic efficiency, while

sacrificing their role to prepare students for independent thinking and civic participation’.

6.2 Market driven curriculum for human obsolescence vs. traditional education for life-long learning

The most predictive evidence-based determinates of employee-ment are relatively short-term reactions to markets - such as the detailed ‘skills schoolset’ determining a curriculum. For example, when computer programmers were in demand, computer programming courses were set-up for students to achieve employee-ment by becoming computer programmers. As this employment niche became saturated, students sought other market defined identities and curricula were changed to match. In contrast, Traditional education is more about process with applications to a wide and varied choice of ideal cultural identities. Traditional education, which was the immediate precursor of current neoliberal education, offered Traditional education at pre-school and primary levels, gradually tapering to more defined options for employee-ment through later schooling and perhaps university as the student reached their mainly socially determined education exit to their work interface. Neoliberal education policy takeover of Traditional education institutions has moved the market determination of identity to the early levels of mass education and thus removed the identity choices that process education conferred. However, as Marnie Holborow argues “neoliberal assumptions about the role of education in the economy not only offer no plausible solutions, either social or educational, to the present crisis but also involve a deeply demeaning view of the role of education in society.” (Holborow, p. 94)

The mass educational expectations of students have changed. Students see themselves as customers of

education services - but they are customers looking for training for jobs that rarely exist at their level of global competitive competence. To earn a living students now need to leverage their diverse cultural identities and have a wider identity than 'employee-ment'; perhaps to create that niche area - like an entrepreneur but in 'Elite' services for the rich - or to create cultural innovations that offer cheap 'equivalence' of elite services but for the new poor - for the new 'huddled masses'.

6.3 A policy question 'What is the purpose of education in a democracy'?

There is not one answer - the neoliberal answer. There are as many answers as there are of ideal-types of cultural identities in the democracy. The story goes that in 2012 the President of America and the Prime Minister of Israel were comparing the difficulty of their jobs. The American President said "I am the President of 313.9 million people, whereas you my friend are the Prime Minister of only 7.9 million" To which the Israeli Prime Minister replied "Yes Mr. President, but if only you knew - I am the Prime Minister of 7.9 million prime ministers."

We complete part 6.3 with some insightful quotes on education only for employment from Mike Rose, Research Professor in Education at UCLA - the home of Milton Friedman, foremost proponent of Neoliberalism

1. "What is the purpose of education in a democracy"
2. American business has been a major player in contemporary school reform efforts. The motivation is straightforward: to urge the preparation of a skilled workforce.
3. As extensive as some of the lists of 21st century skills are, there are topics you won't find: aesthetics, intellectual play, imagination, the pleasure of a

subject, wonder. The focus of the lists—even when creativity is mentioned—is overwhelmingly on utility and workplace productivity.

4. The 21st-century-skills philosophy of education is an economic one. The primary goal is to create efficient and effective workers
5. The economic motive has always figured in the spread of mass education in the United States, but recently it has predominated, edging out all the other reasons we send kids to school: civic, social, ethical, developmental. Even those 21st century skills that do deal with the civic, such as cross-cultural understanding, are expressed in terms of workplace effectiveness.
6. education prepares the young for the world of work and enables the nation to maintain global economic pre-eminence
7. To be sure, economic prosperity has long provided a potent incentive to fund and improve schools in the United States, but it is only one of multiple goals of education in a democracy.
8. Economic preparation is a primary goal of every nation in the world today, repressive societies included. Shouldn't education in a democracy have a richer set of goals? Even if our policymakers seem to lose track of this broader purpose, students and their parents on the whole do not.
9. School is one of the primary institutions where we define who we are.
10. We need to reclaim that broader vision, for we have terribly narrowed our thinking about school. Our tunnel vision is dangerous because the reasons we give for education affect what we teach and how we teach it. Vocational education provides a cautionary tale of what a strictly economic focus can yield
11. The way we express the purpose of schooling shapes our collective definition of the educated person. If we want our youth to thrive and stay in school, the goal of all current school reforms, then we need an

education policy that embodies the full range of reasons people go to school in a free society.

Mike Rose is on the faculty of the Graduate School of Education and Information Studies at UCLA and is the author of "Why School?: Reclaiming Education for All of Us."

http://www.truthdig.com/dig/item/questions_education_reformers_arent_asking_20100318?ln

7. Policy dissent and order of 'negotiations' into the public sphere

In this book, authors as traditional Policy-users in education have written to challenge the narrow and short-term market determination of the employment curriculum, the self-promoting governance use of resources tied to compliance standards and to flatten the tall hierarchies of negotiating committees that block user-values from resource decisions. Their policy dissensions will inevitably cycle to success or failure in the public sphere. We now consider that dynamics of generation, negotiation and negation or support of education policy in the public sphere in terms of the dynamic interactions of covert influences of private identity and the garnering of support for public identity from Culturometric perspectives both of policy-makers and policy-users.

The dissensions in our six Sections derive from perceived differences between the outcomes of private and public policies of policy-makers and policy-users. The dynamics of policy generation and the subsequent cycles of amendments leading to final support or rejection are categorised into four qualitative areas of dissent as shown in figure 3. The policy dissensions of policy-makers and policy-users reported in our chapters can be located within these areas. Other example are given by Inna Deviatko (2002) who discusses policy influences over two decades of higher education reforms in Russia; Sarah Yabroff (2009)

who highlights the disconnect between the reality of how second language instruction and acquisition actually functions and second language policy and legislation within the United States education system; Doug Stokes (2006) reports the covert influences of US-sponsored counter-insurgency documentation on the Colombian system: 'Is the public education system vulnerable to infiltration by insurgent agents? What is the influence of politics on teachers, textbooks, and students, conversely, what influence does the education system exercise on politics?' (Stokes, 2006, p. 373), etc.

There are of course many examples of covert gender, racist and anti-Semitic values influencing public education policy to over-ride values of equity but one example must suffice here. Michael Greenberg and Seymour Zenchelsky (1993) explain that how one such case of policy dissent and order of 'negotiations' into the public sphere brought about a change in the institutional identities of American universities...

"During the 1920s and 1930s Rutgers University restricted the number of Jewish students it admitted, a practice common at that time. This covert policy was resisted by the Jewish community, which pointed to the university's support by public funds. Despite having evolved from a small college to a university by means of public funds, Rutgers was still governed by private trustees. In the 1920s and 1930s these trustees continued to exercise virtually autonomous control, even though Rutgers was accepting increasing amounts of public money. But the state of New Jersey was beginning to challenge this exclusive control. This challenge and the related issue of funding forced Rutgers authorities to participate in an internal struggle over the nature, identity, and role of the institution." (Greenberg, & Zenchelsky, 1993, p. 295)

		POLICY-MAKERS	
		Private policy	Public policy
POLICY-USERS	Private policy	1. Recrimination (Spy, covert 'behind the scenes' underground information collection and influence)	3. Accusation by makers (Lobbying by policy makers for policy)
	Public policy	2. Accusation by users 1 st Public policy (lobbying by policy users against policy)	4. Public influence 2 nd Public policy (Politically correct discourse)

Figure 3: Culturometric areas of policy dissent and order of 'negotiations' into the public sphere

Order of 'negotiations' into the public sphere

1. Policy is prepared influenced by recriminations from users motivated by lack of alignment with their Private Ideal-type cultural identity. Specifically, underground covert influences from the private policy of policy-makers produce a 1st public policy description. This policy description hides the difference between promoting the policy-makers private and public ideal-types. The policy is couched in 'Milton Model' language structures to gain user acceptance by promoting trust or the need for trust of policy-users and by encouraging users to imply alignment of context indeterminate policy values with their own value contexts. A draft that does not yet have finished protective Milton Language is sometimes captured and 'leaked' by private ideal-type identity interests of intended users.
2. The 1st policy is made public by policy-makers. Public reaction from the public ideal-type cultural identities of users is that of Accusation. Dissentions of policy-users motivate accusations that the 1st public policy serves the private ideal-type values of the policy-makers. Additional evidence from users highlights the specific

contexts of users that conflict with the values proposed in the policy.

3. Dissentions of policy-makers that policy-users have private covert motivations for undermining the policy. Policy-makers take steps to censor/hide/discredit information about contradictory user contexts i.e. those that are not aligned with the policy values. This results in a 2nd public policy formulation implying alignment valued user contexts for which contradictory information has been censored/hidden.
4. Policy-makers influence public support 'for' and policy-users influence public support 'against'.

The public policy can then cycle through 2>3>4 driven by 1 until duration of process drains motivation of makers (Filibustered) and policy dies or makers gain the public influence and it passes. System resources are biased towards the policy-makers because policy-users can only martial resources against major policy changes. Hence, it is in the interest of policy makers to pursue a bottom-up pyramid strategy of making many small policy changes that users do not have the resources (including motivational resources) to challenge. This is like the thin end of the wedge applied in many places to make continual small lifts in public compliance across all values and contexts. The ubiquitous use of neoliberal language is some evidence for the success of this neoliberal strategy over the last 30 years.

8. Constructing neoliberal academics: The Performative identity

In this section we see ways in which other education policy researchers also consider how the performance of neoliberalism in education institutions enculturates academic identity, changing traditional educationists into neoliberal academics. Stephen Ball writes from self-reflection - using Foucault's term 'subjects' meaning persons 'being under dominion, rule, or

authority, as of a sovereign, state, or some governing power; owing allegiance or obedience' as in 'subjects of the Queen and country'. As there are more than twenty meanings of the word 'subjects' we use the more specific term 'cultural identities'.

"I was produced and formed as a welfare state academic subject in these contexts. Over the past 20 years, I have been re-formed as a neoliberal academic subject. ... those aspects of reform ... have required me to make myself calculable rather than memorable" (Ball, 2012, p. 17). He calls this changing of cultural identities "the neo-liberal curriculum of public sector reform" (p. 485). He uses the term 'subjects' where we would use the term 'cultural identities'.

"the neo-liberal curriculum of public sector reform. That is a content of change through which public sector workers (teachers, doctors, social workers, bureaucrats etc.) must 're-learn' their practice and values, and find themselves 'made up' as different kinds of subjects....is the making up of students (and teachers) as entrepreneurial subjects" (Ball, 2010, p. 485).

Ball identifies the neoliberal process effecting reconstruction of identity as 'Performativity' which he describes thus:

"performativity – a powerful and insidious policy technology that is now at work at all levels and in all kinds of education and public service, a technology that links effort, values, purposes and self-understanding to measures and comparisons of output." (Ball, 2012, p. 19).

".. the work that performance management systems do on the subjectivities of individuals. Performativity invites and incites us to make ourselves more effective, to work on ourselves to improve ourselves and to feel guilty or inadequate if we do not. It operates within a

framework of judgment within which what 'improvement' and effectiveness are, is determined for us, and 'indicated' by measures of quality and productivity. Performativity is enacted through measures and targets against which we are expected to position ourselves but often in ways that also produce uncertainties about how we should organise ourselves within our work. ... Performativity 'works' most powerfully when it is inside our heads and our souls. That is, when we do it to ourselves, when we take responsibility for working hard, faster and better, thus 'improving' our 'output' as part of our sense of personal worth and the worth of others. ... Indeed performativity works best when we come to want for ourselves what is wanted from us, when our moral sense of our desires and ourselves are aligned with its pleasures. In a sense it is about making the individual into an enterprise, a self-maximising productive unit operating in a market of performances – committed to the headlong pursuit of relevance as defined by the market”(Ball, 2010, p. 487).

One policy-maker input for accountability cascades through the lower echelons of authority like an avalanche covering all diversity below, simply because accountability holds each level of authority responsible for the accountability of those below. For example, the Head of Department (HOD) is tasked with summarising some minutia of teachers daily work so the HOD must make the teacher accountable for reporting the data to be summarised and even responsible – in the name of efficiency – for summarising it in the formats required. As the HODs becomes a more accountable people, valuing accountability over teacher functions they instigate further accountability responsibilities for their teachers. “Increasingly, as we adapt ourselves to the challenges of reporting and recording our practice, social structures and social relations are replaced by informational structures. We are burdened with the

responsibility to perform, and if we do not we are in danger of being seen as irresponsible. Performativity is a moral system that subverts and re-orient us to its ends. It makes us responsible for our performance and for the performance of others. 'There are two technologies at play here turning us into governable subjects – a technology of agency and a technology of performance' (Davies and Petersen 2005, p. 93)" (Ball, 2012, p. 19).

"We are empowered to make ourselves into different or 'new' academics and we do much of this making to ourselves and to each other as well as in relation to the new performative professionals – who are in Weber's terms 'specialists without spirit' (Ball, 2012, p. 19)

Keddie, Mills and Pendergast (2011) note the same process of identity formation for a school, Lyminfion, Australia. The school in turn forces this cultural identity on its teachers:

".. their construction of a school identity around academic excellence, learning innovation and educational leadership. This identity is constructed through an emphasis on pride in their high achievement and their continual striving for improvement. It is also constructed through specific entrepreneurial language or symbolism that suggests a corporate consensus in terms of the school's 'agreed' set of priorities . .. Here the school's fabrication of identity is seen as a carefully crafted and managed version of reality around performance and accountability where only certain possibilities of being have value and currency. This fabrication for Lemontyne is powerful in terms of disciplining teachers. It is also powerful in shaping understandings around what constitutes quality education." (Keddie, Mills & Pendergast, 2011, pp. 81-82).

8.1 Dealing with the distress and dissonance of neoliberal performativity

Of course, being forced to change one's identity under threat of losing one's livelihood causes some trauma to many teachers, principals and university academics. Stephen Ball and Antonio Olmedo, (2013) report on performativity that "It is, for a number of teachers, demoralising, depressing, frustrating and very stressful. ...The effects of such impositions are experienced at symbolic and physical levels by many teachers. 'Demoralisation, depression, frustration, and stress' are tropes of experience that recur" (Ball & Olmedo, 2013, pp. 89-90)

"Davies and Petersen (2005b) describe the 'disillusioned and distressed' academic worker, and Beck and Young (2005, 184) evoke the sense of 'crisis and of loss' and 'alienation and anomie' entailed by the 'new times'. Attention has also been drawn to the inherently masculinist nature of new managerialism and hence its implications and consequences for women in the academy (e.g. Hey and Bradford, 2004). Much of the analysis concludes that the introduction of audit, markets, surveillance and managerialism into higher education has had negative and pernicious consequences. As indicated above, it has been argued that audit regimes have negative consequences for academic identities, morale and stress. There are also various accounts of the deleterious impact of particular technologies, such as the RAE, on motivation, teaching and equality (e.g. McNay, 1997; Henkel, 2000; Sikes, 2005)" (Archer, 2008, p. 267).

One way of dealing with this is to affect an 'irresponsible' Gandhian type of passive resistance in which, as we said earlier, we question the 'slippage points' from policy-making to policy-use as this highlights, in Foucault's sense, the distinction between

acceptable power and unacceptable domination (Foucault, 1997a, p. 298).

The following summarises how teachers successfully think and act to protect their humanistic cultural identities.

“By acting ‘irresponsibly’, these teachers take ‘responsibility’ for the care of their selves and in doing so make clear that social reality is not as inevitable as it may seem. This is not strategic action in the normal political sense. Rather it is a process of struggle against mundane, quotidian neoliberalisations, that creates the possibility of thinking about education and ourselves differently.” (Ball & Olmedo, 2013, p. 85)

8.2 The immorality and identity dangers of ‘doing without being’: Surrendering to neoliberal policy

Sue Clegg implies in her article ‘Academic identities under threat’ that claims that we can deal with the situation of doing unacceptable neoliberal tasks without having to become a neoliberal, that we can ‘do without being’ and states that “despite all the pressure of performativity, individuals created spaces for the exercise of principled personal autonomy and agency” (Clegg, 2008, p. 329). However, this is widely rejected by psychological and ethical research. What Sue Clegg might have observed is the effect of forced performativity on dissonance to reconstruct the educationist as a neoliberal academic. This is referred to below through the work of Bouie Jr (2013), Harmon-Jones, E., Amodio, & Harmon-Jones, C. (2009), Harmon-Jones, E. & Harmon-Jones, C. (2002) and Henkel (2005). Dissonance makes action necessary. However, compliance with the Neoliberal performative that created this dissonance should be avoided in preference to group actions that maintain the traditional educational culture of the university.

Commenting on Clegg (2005), Suzy Harris in her rethinking academic identities in neo-liberal times concludes “we need to recognize ourselves as agents ‘with the potential for collective agency’ (p. 14) and that it is important that we do not reduce the problems/issues to the individual but to see it as a collective struggle” (Harris, p. 421).

Doing without being was rejected as moral philosophy in the 1960s when ‘Value ethics’ philosophically succeeded the earlier empiricism of consequence and neoliberal type rule-following of deontology (Anscombe, 1958; Blau, 2000).

“However, we also need to appreciate the inconsistencies and ambiguities within the social field and discourses which enact this identity in practice. While we need to understand how these elements and their relations enter into us and encourage us to work on ourselves in a variety of ways we also need to hold firmly onto a sense that we are none of the things we now do, think or desire. This is a necessary precursor to the possibility of free and critical thought in the neoliberal university” (Ball, 2012, p. 26).

For this we would have to perform behaviours that we know do not represent our values. The serving of conflicting values by ‘doing without being’ can contribute to rather than reduce the values trauma of cognitive dissonance (Henkel, 2005). Though, unfortunately, forced dissonant neoliberal actions of ‘doing without being’ can promote change from humanistic to neoliberal beliefs (Bouie Jr, 2013; Harmon-Jones,, Amodio, & Harmon-Jones, 2009; Harmon-Jones, & Harmon-Jones, 2002). What Ball (2012) refers to as neoliberalism’s construction of ‘ethically malleable’ people (p. 145) “the neo-liberal subject is malleable rather than committed, flexible rather than principled” (p. 31) “which involve the subordination of moral obligations to economic ones

(Walzer, 1984) so that 'everything is simply a sum of value realised or hoped for (Slater & Tonkiss, 2001)' (Ball, 2012, p. 20). Culturometrics totally disagrees with this in that its fundamental anthropomorphic identification with 'the other' as the foundation of viable policy possibilities ensures the subsequent humanity of education policy.

A possible systemic way forward is to require the corporations that own the worldwide \$400 billion business of education to legally acquire the civic identities of corporate citizenship and the concomitant legal, economic, ethical, social and civic responsibilities of persons (Matten, Crane, & Chapple, 2003). Soudabeh Jalili's Chapter 35 on 'Organizational Civilization' recommends that organisations should be so judged on civilising values. As these are the traditional values of Universities as citizens it would mean that current psychiatrically disordered personalities of corporations could recuperate to the social normality of traditional universities (Nagy, & Robb, 2008). However, there are also dangers down this road if corporations have the power to redefine the meaning of citizenship (Crane, & Matten, 2008).

A recent study by Louise Archer (2008) of academics' professional identity constructions as neoliberals specifically explored this issue of 'doing without being' and her conclusions agree with the humanistic guidance of Culturometrics "whether it is possible to do without being a neoliberal subject—the conclusions from this study would appear to be contradictory. In general terms, the answer is 'no'—subjects cannot exist outside of the conditions and locations within which they are located and by which they are constituted. Furthermore, we might argue that any performances of neoliberalism (irrespective of the inscription, or not, of the subjective) are, in themselves, an issue for concern, not least when such

performances potentially compromise the idealised ('traditional') values of higher education" (p. 283).

9. Similarities of neoliberal and nazi policy: Survival of the fittest- Work will set you free.

If we know our values are humane and yet we choose behaviours that do not represent our humane values we are not only choosing inhumane behaviours we would be knowingly culpable of inhumane behaviour. This is an anathema to Culturometrics, a reneging of moral responsibility and the road back to Auschwitz.

It is not only the Political Elite Oligarchical values of the fascist Robert Michels (1915) now resurrected by global Neoliberal education policy that takes us there. Rodolfo Leyva makes a more direct link between Neoliberal policy and Nazi policy through their common dependence on Social Darwinism:

"The infamous Social Darwinism of key intellectual Herbert Spencer, and its explicit eugenics, racist, and free-market ideology of "Survival of the Fittest," was rendered unfashionable as Western democracies were quick to disassociate themselves with explicitly Nazi-related ideologies (Degler, 1992). ...the historical continuities between Spencer's Social Darwinism, and the essentialist ideals of meritocracy, selfishness, and competition that are advanced by neoliberalism. ... Social Darwinism has also resurfaced in neoliberal economics and free-market policies where the similarities between Spencer and Friedman Hayek's (1994) brand of unrestricted markets are almost identical" (Leyva, 2009, p. 364). We know to the 'perfections' to which these social ideals of Work and Human Resource Management will lead us because we have been done that road.

Figures 4a to 4d: Social ideals of Work and Human Resource Management



2. Auschwitz, Poland - Concentration camp opens April 1940
The message: "Work makes one free."

Figure 4a: Entrance to Auschwitz 'Work makes you free'



Figure 4b: Bales of the hair of female prisoners found in the warehouses of Auschwitz at the liberation. *Photo credit: Polish National Archives*



Figure 4c: A warehouse full of shoes and clothing confiscated from the prisoners and deportees gassed upon their arrival. *Photo credit: USHMM Photo Archives*



Figure 4d: Spectacles, Auschwitz



Figure 4e: Suitcases, Auschwitz

Source:

http://modestine2011.blogspot.com/2011_06_19_archive.html

10. Other policy roads to new horizons of pluralist education

Now we must take other policy roads to new horizons of pluralist education, as signposted by Hursh (2009) in challenging neoliberal policies the growing divide between the rich world and the impoverishment of education; by Hyslop-Margison, and Sears (2006) in Reclaiming education for democratic citizenship; by Henry Giroux's reports on recent attempts by faculty and students to resist the corporatization of higher education (Giroux, 2002, 2005); by practical social responses to inequality and crisis (Cox, 2010); by Burgmann (1993) and the authors of our chapters.

"An 'iron law of protest' operates as surely as and 'iron law of oligarchy'; just as elite theorists insist that large organisations will be inevitably controlled by a tiny minority, so it can be claimed that people will inevitably challenge this conservative power" (Burgmann,1993, p. 1)

We start at the level of the individual educationists and the cultural group by strengthening cultural identities and generating humanistic hypotheses for resistance to neoliberal destruction of a caring identity. Educationists report that it works to reflect through one's values and on the options for actions that represent one's values:

"... when the teacher begins to look for answers to questions about the how(s) of power inside and around him or her, the how(s) of his or her beliefs and practices. In these moments, the power relations in which the teacher is imbricated come to the fore. It is then that he or she can begin to take an active role in their own self-definition as a 'teaching subject', to think in terms of what they do not want to be, and do not want to become, or, in another words, begin to care for themselves. Such care also rests upon and is realised through practices, practices of critique, vigilance, reflexivity, and of writing." (Ball & Olmedo, 2013, p. 86)

Others, including Niclas Rönström (2013) and Cris Shore and Susan Wright (1999) also conclude that we can "respond to the more damaging aspects of this neo-liberal agenda through 'political reflexivity'" (p. 557).

... and so through the clarity of our hermeneutic cycle, 'reflection' returns us strengthened to book one.

More can be learnt about Culturometrics by visiting www.Culturometrics.org from which this series of books on Cultures of Education can be freely downloaded.

11. Cultural perspectives - Selected chapters

11.1 Editorial comments on Policy Meanings and Uses of Achievement

'Achievement' is the Media-scape policy tool that fires and spins 'gap-talk vs. equality' debates determining resource allocation in recuperative education. The Cultural Identities defining objects of the debate presented by the chapters in this first section include – gaps between – genders, curriculum subjects, institutions and pedagogic roles. The main policy-values divide reported here is between the neoliberal values of policy-makers and the wider humanistic values of policy users. The chapters give examples where aggregation of achievement statistics is seen as serving spin, stereotyping the objects of debate to hide composite identities that contradict evidence for neoliberal policy directions. The contested tool of 'achievement' in this and following sections is most commonly the competitive accountability tables of National exam results on an increasingly narrow employee-ment curriculum. These competitive publicised achievement tables promote neoliberal policies by firing a fantasy of fears of a 'frighteningly large' 50% below average (*sic*) being at risk of exclusion from some assumed security of 'virtual' future employment. In several chapters anger at this assault on the Cultural Identities of the authors and of the communities they report becomes tangibly palpable through their own words.

Professors of Education Wayne Martino and Goli Rezai-Rashti from The University of Western Ontario, Canada, open this section, our book and our eyes with the nominalisation of 'failing boys' as an example of achievement gap-talk motivating contested neoliberal recuperative policies. They have aptly titled their chapter 'Gender Polemics, Achievement and The Policy-Research Gap: The Mis-alignment and

Alignment of Stakeholder Positionalities within a Global Education Policy Field and a Context of Neoliberal Governance'. In this chapter, they use the perspective of 'discourse analysis' to note that the nominalisation of 'failing boys', and the aggregated statistics it labels, flattens out diversity and thus hides from policy debate, and hence blocks from resource access, the multitude of important composite cultural identities that impact on achievement. Professors Wayne and Goli conclude their insightful example "It is in this sense that the failing boys discourse functions within a regime of truth in which boys are constituted as particular sorts of subjects and as targeted objects of a specific policy technology (Ball, 2008), with the effect of flattening out diversity and with implications for what is to count as both evidence and equity (Luke et al., 2010)." p.12

In Chapter 2 Kristine Antonyan, Director of Research at Yerevan State University in Armenia contributes to our examples of the varied international policy uses of 'achievement' in her chapter 'Armenian Higher Education Developments: Issues, Challenges and Opportunities'. Dr. Antonyan reports an example of Armenian country-wide policy to increase achievement of social indicators by using the Bologna process. In Chapter 3, our authors Joana Marques, Luisa Veloso and João Sebastião in 'How to Rebuild a Secondary School: Space, Knowledge and Education' present a different example of using achievement to drive policy in a different country - to support school building in Portugal. Ideally, values that define the current education processes should also inform the architectural functionality of schools - so we might ask 'are monetarist values that define current education, such as doing more with less, visible in the educational functionality of current designs'? Their chapter reports on policy supporting the building of a secondary school which was to promote children's achievement by

giving them an environment conducive to learning. The building specifications promote behaviours that must be symbolic of the values of the learning processes. However, these behaviours were symbolically different for different stakeholders. For example, for the architect the computer technology facilities were seen as a priority for producing learning by giving access to information and independence of choice in the direction of learning. Whereas, the teachers saw this as their role, i.e. in the eyes of the teachers, teaching included behaviours for supplying information and directing choice of content for learning. Hence from the Culturometric perspective there was a mis-alignment in prioritising the behaviours as symbolic of the 'meaning values' - the VABI - defining learning for the architect and the teacher stakeholders. The contexts were different. The teachers' context was one of directed learning but the architect's context was one of facilitating information-gathering and choice. We can see that a Culturometric policy resolution of aligning the values in context of the architect and the teachers would have been achieved by putting the architect's context within the teaching context; that is putting the computer facilities under the direction of the teachers as a tool for children to do what the teachers directed.

In Chapter 4, we go to New Zealand and Camilla Highfield, Director of Professional Learning and Development at the University of Auckland to look at across-school and within-school variation of student achievement in New Zealand secondary schools. Camilla's gap-talk compares English, mathematics and science departments across and within-schools in New Zealand based on their students' national exam grade achievements. She notes "there is considerable variation in student achievement between academic departments across and within schools" and calls for equity – presumably though, not a solution of equal

achievement in the subjects (norm-referenced) at the lowest common denominator of equal achievement of the subjects (criterion-referenced). From the gap-talk of aggregated data in Chapter 1 we see that others might question the measuring rod itself, not only in the comparative complexities of the subjects but also in the ways it applies to the values and contexts of English students, mathematics students and science students, both male and female, etc. across the different demographic identities of the study.

In Chapter 5, 'Lara Fridani and Joseph Agbenyega from Monash University, Australia, write about school readiness and transition to primary schools in Indonesia. Their chapter shows us the need to align values in Committed Communication. In their 'Whole Schooling Framework' for rethinking school readiness and transition policy and practice in Early Childhood Education we see from the policy perspective that has been passed to the schools a need to align values between the 'ideal type' for a given developmental stage of child cultural identity that schools are initially catering for and that which families of young children envisage. Do the identities enculturated by the schools match those required by their communities. One wonders what proportion of the Indonesia's 86% Muslim families might include Article 153 Bumiputra brethren intended to enter Primary school at age 7 with Islamic values rather than entering pre-school at age 3 with academic ambitions. These cultural policy issues on achievement lead to the policy example of Chapter 6 which clearly shows that the narrow neoliberal values of the policy-makers who allocate resources to monetarist policies are not the same as the wider humanistic values of the policy-users, the teachers and parents who need the resources. Our authors from Portugal, Professor Helena Araújo and her colleagues, meta-comment on the resulting financial problems that are the background to their

Chapter 6, 'Building Local Networking in Education? Decision-Makers' Discourses on School Achievement and Dropout in Portugal'. This is a global problem infecting cultures of education policy that reverberates internationally throughout the sections and chapters of this handbook... namely:

It is worth mentioning that 2012 is being a year of severe social, economical and financial crisis. The Education Ministry does not appear to be too much concerned on these policies issues. Therefore, the paper is focusing on policies that although still in place, start to face difficulties in keeping momentum. (*Footnote 1 p. 157*)

The central government traditionally funded traditional humanistic values of pedagogy. However, the central government has passed now changed values of policy-making to committees of local politician councillors. The monetary discourses of local politicians' naturally centre on what can be done with existing resources so, for example, the chapter reports their policies favour socio-educative projects. The end-users are parents, teachers and the local community who hold the wider traditional pedagogic values they expect their local education policies to continue serving. These two demographics have different values. The community would like the government, who hold the purse, to authorise committees of teachers-parent partnerships within the community, including the business community, to determine policy on the 'pedagogical ends of schooling'. However, whilst the government continues with neoliberal policies it is unlikely to direct resources under its control to the traditional policies that are still in place for the enculturation of cultural identities that are more than competitive employees. This neoliberal policy change from traditional government as representative steward of resources to directive governance of resources will surface explicitly later in our section on Governance.

Chapter 7 looks at the other side of the 'gap-talk' policy coin, the 'equality' of achievement that the recuperative policies motivated by the gap-talk are intended to accomplish. The Culturometric resolution of the misleading process vs. product meanings of equality as equal opportunity vs. equal outcomes is, as mentioned earlier in this preface (p.xlvii), to choose between processes, to choose an equality of the most empowering process, that is an equality of education that enculturates one's ideal cultural identity. Culturometrics offers the Cultural Index as an objective measure for verifying the equality of outcomes. In their chapter 'Is the Quality of Education Equal for all?', Professor Burusic and his research colleagues at the Institute of Social Sciences Ivo Pilar, Zagreb, Croatia, claim for their study the possibility that "Since the proclaimed education policy is that all the students should have equal opportunities for a quality education (*emphasis added*), the results of this study can be observed as an indicator of the outcomes and as an empirical verification of the degree to which the proclaimed policy is accomplished." (p.211). Within the frame of this chapter the reader can then enquire 'Whose definition of 'quality education'?

11.2 Editorial comments on Policy for Family Involvement for Formal Education

Our seven chapters in this section report influences of education policy on the involvement of families with the formal education of their children. These chapters from different nations show, in their different ways, that formal education needs family support and that success in obtaining family's support is dependent on the system's affirmation of the family's education values – that is, the degree to which the ideal-type of student cultural identity promoted by education policy aligns with that of the family's. Raquel-Amaya Martínez-González, Lucía Álvarez-Blanco and M^a Henar Pérez-Herrero from Spain open this section with their

Chapter 8 on parents' and teachers' views on family involvement concerning the problem of teenagers at-risk of dropping out of High School. The main predictor of children dropping out of school is 'grade retention'. It is clear that being held back in a lower grade signals the antithesis of the ideal-type of cultural identity that families would want for their children. " ... grade retention affects, among other factors, the student's self-esteem, socio-emotional adjustment, peer relations and school engagement ..." (p.224)

In Chapter 9 'Teachers' Reflections on Parental Involvement in Emergent Literacy Development in Rwanda', Pierre Ruterana raises several key issues on how to improve "emergent literacy" in Rwanda. The government obviously wants families to do more in educating preschool children. The view presented by teachers are in line with Rwanda's Ministry of Education policies on sensitising local authorities, opinion leaders, parents, communities and the civil society on their role in implementing early literacy development. Although parents views are yet to be canvassed, his chapter signals a mis-alignment of values that seems to exist among many Rwandan families who still consider teachers as sole stakeholders in dispensing emergent literacy practices. From the schools' perspective this is one of the causes of poor performance in literacy at national level, e.g. "Schools are privileged places where the sown family seed of literacy will grow." (p.265). In addition, although many Rwandan rural children are, in comparison to children in more developed countries relatively ill-equipped with literacy learning resources (paper, pencils, crayons, story books, etc.), they join nursery school with comparatively strong oral literacy skills that could be exploited, perhaps through play, to enhance self-esteem and literacy confidence among these young children.

Our next two chapters, Chapters 10 and 11, consider policy processes that try to formalise family's responsibilities for the education of their children. These policy processes tend to fail because they attempt to impose through government control of schools the government values of the ideal child and do not sufficiently allow for families to negotiate their values and have them affirmed by the formal system. In Chapter 10 'Home-school agreements in England: Symbolic value and contractual relationships between school managers, parents and pupils', Howard Gibson from Bath Spa University, England, shows some problems of replacing negotiated values of committed communication with top-down legal compliance to the ill-fated 'Home-School Agreement'. Of course the 'responsibilities' wishfully placed on families are those areas publicly recognised as failings of the schools. These correspond to the cultural identity of a government ideal-type of parent, a role which families expect to be subsumed by the school but one they expect to be aligned to their own often different family cultural values "The rhetoric of choice and partnership is used as a smoke screen for control and discipline and the imposition of a model of 'good parent' is being superimposed over the ordinary obligations that all parents share" (p.286). Although intended to place responsibility on families for their child's attendance and behaviour, this 'agreement' "differs from 'parenting contracts' that are imposed by a court to secure 'an improvement in the child's attendance and behaviour'" (p.284). Dr. Gibson shows the attempted force of legal compliance and the lack of negotiated values as follows:

"Their policy, Every Parent Matters, said that 'parents unwilling to accept help and fulfil their responsibilities must be compelled to do so' (DfES, 2007, para. 4.28). This 'responsibility agenda' became progressively more strident towards the end of the decade so that by June

2009 the Secretary of State for Children, Schools and Families warned: 'Once their child is in school, the parents will be expected to sign the agreement each year and will face real consequences if they fail to live up to the responsibilities set out within it, including the possibility of a court-imposed parenting order' (DCSF, 2009, p. 3. See also Gibson & Simon, 2010)." (p.285)

In his conclusion, Dr. Gibson brilliantly identifies the problematic lack of negotiation and calls on Habermas to remind us of the necessary principles of Culturometric committed communication "There is, therefore, a tension between legislating for voice and reaching agreement while attempting to neuter it as a site of potential struggle. ... The point is to protect areas of life that are functionally dependent on social integration through values, norms, and consensus formation, to preserve them from falling prey to the systemic imperatives of economic and administrative subsystems growing with dynamics of their own, and to defend them from becoming converted over, through the steering medium of the law, to a principle of sociation that is, for them, dysfunctional. (Habermas, 2006, p. 371, 372-373)" (p.317)

In our Chapter 11, Karen Freeman from Chicago State University, USA, writes on the rising parent entitlement of home-schooling. Home-schooling is not a recent phenomenon, but has been around for a long time - some would tautologically argue even before formal schooling - and its prevalence is rising with the rising population of children. Parents are the most invested stakeholders. Home-schooling is driven by the personal and moral values of parents who invest their own time and energy for what they consider is the betterment of their children. In this chapter, as in chapter 10, we see some of the different values that

home-schooling parents feel are lacking in their options for formal schooling.

The last three chapters in this section report ways of utilising family involvement that help redress the current global narrowing of education policy to monetarist values, namely by (i) the inculcation of traditional social values, (ii) a policy model for empowerment of parent values and by (iii) involving grandparents in children's values education. In Chapter 12, Dace Medne reports her research on the quality of upbringing given by families in Latvia – a society with rapidly changing values. As Head of the social care division at the Social Care Centre for Children in Pļavnieki, Rīga, she is well positioned to highlight the rapid social changes of values in public and in individual contexts that Latvian families must now negotiate and incorporate into the ideal-type of cultural identity they want for their children. Dr. Medne's research presented here surveys the levels of parents' competence for enculturating these new values of their rapidly transforming society. In Chapter 13, Julian Brown from the University of Northampton, England uses an action research methodology to look at Parent Empowerment whilst examining parental attitudes of school systems. His research points to the policy success of Culturometric committed communication in aligning the values of schools and families. He observes that "In some respects, these different attitudes can depend upon the parents' circumstances, e.g. "Often, in the case of working parents, there is a lack of time to support students with their learning or engage with the school in the desired partnership" (p.378). After considering the family's perspectives, his research suggests schools could begin to move from a partnership model to one that empowers parents and embraces advocacy and so more closely align themselves with the attitudes and values of the parents. He concludes that "This model

could prove beneficial for practitioners and researchers wishing to create advocacy for parents and align the values and attitudes of all stakeholders in a school context.” (p.374) Giulia Cavrini and Liliana Dozza from Bolzano northern Italy close this section on family involvement with their Chapter 14 on ‘The social role of grandparents: Values, attitudes, purposes and behaviours’. The variety of values expected from education and richly embedded in their research contrasts markedly with narrow monetarist values currently driving global education policy and student outcomes. “A total of 865 grandparents completed a questionnaire on the time spent with their grandchildren, the relationship with their own children, the approach used in raising grandchildren and the level of emotion and love involved. Results show that grandparents influence values, attitudes, purposes and behaviour in addition to being crucial to children’s learning later in life; they are responsible for nourishing active participation in their social lives, fostering feelings of respect for traditions and increasing the level of consciousness in their own historical and cultural roots.” (p.404) Priceless: For everything else there’s neoliberalism (*with acknowledgement to ‘MasterCard’ tm*)

11.3 Editorial comments on Community Involvement and Education Policy

Communities emerge and change for the primary purpose of promoting their ideal type of Cultural Identity. Their formal policy describes their public processes for doing this. The chapters in this section on community involvement and education policy highlight the processes involved in negotiating formal policy determining ‘values in context’ within communities and between communities. In our opening chapter, Chapter 15, Martin Retzl from the University of Vienna criticises the top-down failings of current value determination for successful educational

change and school reform. Based on "John Dewey's democratic ideal" as a precursor of committed communication to align school and community values, he introduces us to a series of successful steps for schools and community stakeholders to negotiate values in contexts. These included common efforts to change the basic manners and attitudes of the children, agreements between parents and teachers, and between pupils and teachers, on appropriate behaviour and consequences for misconduct, as well as cooperation between the school and community representatives for providing social and psychological support. Questionnaires were used as a vehicle for pupils and parents of a school, as well as community representatives, to continually be made aware of each other's thoughts and suggestions on schooling and instruction, thus enabling the development of concrete on-site action strategies to promote negotiated values. In Chapter 16 "The 'Free' Child", our authors Ann Pihlgren and Malin Rohlin from Sweden frame 'organized after school activities' as the 'upbringing of the community'. Their historical analysis, in line with the Culturometric perspective, shows that "the way the pedagogical identity of the institutions was conceptualized was highly dependent on the governmental idea of what social problem they were intended to solve." (p.437) As an example, afterschool activities were introduced in Sweden as means of promoting the government's ideal-type of child cultural identity – in particular Pihlgren and Rohlin note they were "to control begging and criminality among lower class children when leaving school in the afternoon" (p.438).

The desired outcome of Culturometric committed communication is joint affirmation of stakeholder's cultural identities – affirmation of 'values in context'. A powerful method by which a cultural group, or an individual, can affirm the cultural identity of another

group or individual is to supply a valued service, particularly a leadership service. Chapters 17, 18 and 19 detail types of valued service given to the community by different educational institutions. In Chapter 17, Judith Gouwens and Donna Lander from the US report to us on how school superintendents along the Mississippi coast became community 'symbolic leaders' giving priority to strengthening school communities in their efforts to restore, rebuild and recover from the devastations of Hurricane Katrina.

Universities offer service to the community at the student and faculty interaction levels. Chapter 18 illustrates how universities can at the level of student interaction use the strategy of 'service learning' to affirm community identities. Service learning is a teaching strategy in which students do community service that is assessed as a curriculum subject. Students can be given assessed work-experience course-work assignments 'for course credits' utilising, for example, practicum placements in teacher education, psychology and tourism; practical community service projects in sociology; etc. In Chapter 18, researchers Nives Preradovic, Sanja Kisicek and Damir Boras from Croatia report on over 40 such service learning projects in the field of Information Technology. In this example of service learning, the projects link the goals of Information Science studies with IT problems to service specific community needs – for example, IT students might create websites that promote the cultural identities of their local communities. In our Chapter 19, Spanish professors Val Cajide and Antelo García show how universities can also give community service at the faculty level of interaction through a strategy of 'knowledge transfer' involving collaboration between universities and business communities. Our authors note that such collaboration requires mutual

confidence and conviction and that legislation by pertinent authorities acknowledging the effort required helps to make this cooperation possible.

In the cost-benefit decision balance of neoliberal education policy the choice is only to weigh 'money spent' against 'money recouped'. In each of the last two chapters of this section our research team from Portugal - Joana Fernandes, Jorge Cunha and Pedro Oliveira - demonstrate a case study that attempts to quantify and monetise future soft benefits recouped from education to be weighed against its hard objective current costs. Chapter 20 demonstrates how to measure the economic impact that arises from the presence of a Higher Education Institute (HEI) in a given region. It estimates the additional impact that occurs above the economic activity level that would exist if the HEI were not there. The Polytechnic Institute of Bragança is the HEI in this demonstrative case study. This case study firms up the soft benefits of an HEI to communities in its region. It pits these against hard costs in local neoliberal cost-benefit policy decisions to fund the institution. The region under study includes two towns, Bragança and Mirandela, located in the far northeast of Portugal, in a deprived and isolated area, near the border with Spain. The last chapter of this section, Chapter 21, our Portuguese team presents a more long-term monetary case analysis to justify funding students' education by comparing the amount of money government spends on students' education with the amount of extra money the government receives when that community of students is working. One unsurprising conclusion was that "...the direct stakeholders, namely the government and the students, have different values and attitudes towards the higher education premium"

11.4 Editorial comments on Economic influences and Education Policy

Our seven chapters on economic influences of education policy consider local, country and international effects of promoting common global neo-liberal values in education and through education by exclusively privileging monetarist methods of 'competing for the cheapest' that maximise competition whilst minimising cost. This section opens with Chapter 22 in which Luisa Cerdeira and Tomás Patrocínio give a research perspective from Portugal on 'Student mobility in European Higher Education' – equity aspects of the 'Bologna Declaration (1999)'. These exchanges are financially difficult for poorer students from countries where education is paid from taxes, particularly where these students wish to move to countries where education is paid for twice – by taxes and by the students. Students are represented primarily as paying 'customers' in those countries where monetarist values and their currency targets have usurped the policy processes and decisions in the economics of state education.

The potential diversity of Cultural Identities that result from traditional education is seen in its varied contexts as well as from the varied values it imparts. However, the assault of monetarist methods and their intended outcomes on these wider educational values can be hidden in the statistical aggregation of this valued diversity. This issue is revisited again in chapters 24 and 27 where authors call for economic education policies that are more responsive to a disaggregation of statistics identifying different contexts and identity components of preferred non-neoliberal Cultural identities. International mobility of students and of qualified employees – including students who stay in their host countries as newly qualified employees – financially benefit both the select few who move and the employers in the host countries at the expense of

indigenous employees in both countries. In chapter 23 professor of Education Kingsley Banya gives a non-neoliberal 'talent poaching' perspective on these EU 'Blue card' mobility schemes; particularly on their adverse impact as a 'brain drain' on development in Sub-Saharan Africa.

The presence or absence of tuition fees, or the level of such fees, dominates the current political and ideological discourse regarding affordability and accessibility to higher education in Portugal. In Chapter 24 Luisa Cerdeira and Belmiro Cabrito firm-up some of the soft costs and benefits associated with being a higher education student in Portugal. In doing so they widen the contexts of cultural identity to other forms of social support as doing so would better position European countries on indices of higher education accessibility. However, as monetarist arguments cannot so readily be applied in these wider contexts this questions the veracity of narrow neoliberal values in Portuguese higher education policy. In chapter 25, Valdis Rocens, from the eastern side of the Baltic Sea, shows that marketing models are not predictive of education as a product – perhaps, to swim against the global tide, it is because education is intrinsically not a neoliberal market system. Using a consistent set of monetarist variables and some non-traditional market modelling assumptions, e.g. "The market share can be calculated proportional to the number of students and not proportional to revenue as it is traditionally done in the economic analysis of markets" (p. 676) Rocens proposes a more consistent market model that contradicts international neoliberal policy processes in education by showing that across 17 and 18 countries respectively national development (GDP) goes up the more that is spent on each student ($r=0.88$) but goes down with increased competition between educational institutions ($r=-0.88$).

England has a pay-twice higher education system. Taxes are collected to pay for the education system but, in addition, students themselves must also pay. However, across the border in Scotland higher education is paid mainly from population taxes. As England and Scotland use English as the language of instruction, this contributes to many students from England going across the border to be educated in Scotland. In response to this influx, Scotland is debating the prospects of charging around £9000 to foreign students. The pros and cons of this 'Graduate Contribution' are aired for us in Chapter 26 by Dr James Moir from the University of Abertay at Dundee. In his chapter, Dr Moir emphasizes the development of graduate attributes from the perspective of those engaged in learning in higher education. He stresses the continuing need to enculturate a much wider cultural identity than that matching the neoliberal policy agenda; the need for the development of knowledge and skills not only for the 'knowledge economy', but for living and working across world cultures. He, like our expert authors from other countries across the world, supports the development of skills and abilities that enable the individual to work not only across knowledge boundaries, but to become fully active and engaged citizens. He argues for a more holistic and inter-connected approach and provides new challenges for stakeholders in developing a blueprint for higher education which is relevant to living in the new Europe and global village.

Educationalists across the globe are reporting in this book a loss of professional autonomy and a frustrating decrease in their ability to maintain full educational values in the face of the neoliberal policy onslaught on education. We, therefore, welcome the positive, personal and practical leadership guidance on how to lead in a cost-cutting resource-reducing environment that Professor Shaw, Head of the School of Education

at the University of Wisconsin-Stevens Point (UWSP) USA brings to Chapter 27. She affirms "There was no question that stakeholders wanted to insure the security of their positions while, simultaneously maintaining program quality." She describes one particularly heinous state-wide monetary education policy that was potentially devastating for faculty, both emotionally and professionally, as "For two years, the State of Wisconsin mandated unpaid furlough days for all state employees (which included all employees at the state-funded schools). During state-mandated furlough days, employees were not to perform any work-related duties, including reading and responding to email, answering telephone calls, and so forth. These unpaid days for faculty members resulted in a 3.065 per cent pay reduction in salary (in addition to the rescinded 2 per cent pay raise). Many faculty members felt unappreciated and, not surprisingly, a decline in morale ensued." (p. 715) In this chapter professor Shaw shares with us how she dealt with this, and with other cuts that were made, without losing staff or reducing program quality and while maintaining a spirit of morale among her faculty.

Whereas Chapter 27 shows us a positive individual-level leadership response to the neoliberal reduction of education values, Chapter 28 closes our economic policy section with successful country-level responses to promoting the values of national cultures and languages. In her chapter, 'Celtic languages in Europe and revitalisation programmes: Language policies, language planning and linguistic communities', Dr. Sylvie Gagnon, who lectures in French linguistics, language and culture at the University of Canterbury, New Zealand, illustrates how and why Welsh, Irish and Breton Celtic language revitalisation programmes have been varyingly successful in safeguarding the cultural identity heritages of their communities. The Welsh, like the Catalans in Spain, have been particularly

successful in promoting their traditional language and cultural values by enacting minimum protectionist employment requirements that limit competition for employment to Welsh speakers and by putting in place a slew of civic facilities that support the value enhancing ripple-out effects of this economic policy.

11.5 Editorial comments on Meanings and Uses of Standards in Education Policy

Of all policy tools, 'standards' most objectively denote, at all levels of governance and usage, the values, attitudes, beliefs and intentions (VABI) promoted by policy. They have become recursive in promoting those values both in processes of compliance and in building the ideal cultural identities of supplicant institutions and individuals down through the hierarchy of policy application. The chapters in this section highlight different ways in which educationalists working in government controlled schools and in government-controlled higher education from different countries battle coercive monetarist processes of standards compliance with attempts to negotiate traditional educational identities through committed communication.

The cost effective 'confessional' of standards compliance pervades education policy from student to institutional levels through Students' Evaluation of Teaching to Institutional Evaluations for 'Quality Assurance'. At low or no cost to the policy-makers and policy pushers education stakeholders are required to self-evaluate the quality of their compliance to required standards. In our first chapter on standards, Chapter 29, Pieter-Jan Van de Velde and Floris Lammens describe a system of external Quality Assurance (QA) that has grown, developed and adjusted to the specific context of Teacher Training programmes within Flemish Higher Education. Whilst part of the overall framework is perceived as being

highly accountability oriented and embedded in several legal decrees and top-down policies, there is also a high level of stakeholders representation and participation which might be instrumental in changing the defensive attitude towards outside interference and control often witnessed towards external QA. This was achieved through a resource intensive many-to-many democratic 'village hall' approach to achieving values consensus - with insufficient financial support from government. With regard to the international usability of such a process, the education system in Flanders is less monetised in comparison to England, the USA and many other countries where educationalists would now be less willing to take on extra work without extra payment. For example, this quality assurance programme is part of the proactive study in Flanders' initiative for promoting student mobility. That difference is illustrated by their Asian exchange program (ASEM-DUO Fellowship Programme) where one of the five eligibility criteria is "2). The Flemish higher education institution, as well as the Asian partner cannot ask tuition fees to the students for the exchanges"

(http://www.asemduo.org/sub_2/content.asp?table=bs_03_program&multi=prog_belgium&idx=13&app_form_data_yn=Y).

In comparison the monetisation of English higher education is hindering European exchanges and forcing Scotland to follow suit (See chapter 26, 'The Graduate Contribution'). In contrast, Chapter 30, presented by Ted Zigler, Robert Beebe and Lisa Shoaf from a more monetarist Ohio, USA, also reports a negotiation for compliance standards using representatives that went smoothly with minimum local government support. So we might want to know who pays for smooth negotiation of compliance standards under monetarist policies and why. In keeping with monetarist processes much of the

education budget in the USA is distributed to commercial companies. For example, in Ohio as in other states accountability to compliance standards for children is contracted to commercial test companies. American States are reported to spend \$1.7 Billion/year on K-12 test contracts.

(http://www.brookings.edu/~media/research/files/reports/2012/11/29%20cost%20of%20assessment%20chingos/11_assessment_chingos_final.pdf). Ohio has also extended values of student testing to teacher testing using PRAXIS from the ETS test publisher (Education Testing Services). This is appealingly marketed as measuring the 'Value added' by each individual teacher. However, the behaviours chosen by government to represent 'Value added' are operationally defined by EVAAS Value-Added methodology, provided by SAS, Inc. and are much contested by grass roots policy-users (<http://epaa.asu.edu/ojs/article/view/1096>). EVAAS contributes to standards compliance through 'payment by results' for teachers; the results being students' standardised exam marks on the main 'employment' curriculum skills. Chapter 30 'Principal Accountability Policy and Stakeholder Values', reports the smooth extension from this measurement of standards compliance for students and teachers to measuring standards compliance for School Principals – "language drafted by the writing team was closely critiqued by the Ohio Department of Education, McREL, and the Educator Standards board facilitators" (p. ?) "and the Educational Testing Service, which produces the PRAXIS licensure exam, offered feedback on the alignment." As commercial background "President Obama's Race to the Top competition (2009) encouraged similarly oriented initiatives, contributing over \$350 million in federal support (Robelen, 2012) to be allocated to those states that adopt methods to better measure the "value" a teacher "adds" to student learning from year to year." (Amrein-

Beardsley & Collins, 2012, pp. 2-3) available from <http://epaa.asu.edu/ojs/article/download/1096/982>). We see that here how compliance standards are a tool of monetarist processes used to promote Government neoliberal values. The government introduces compliance standards which are used to divert education tax money to test companies for policing compliance to government neoliberal values. Jackson and Bassett (2005) report that \$517 million is paid to private companies for the 45 million tests used annually as part of the USA's 'No Child Left Behind' programme. Guiding the acceptance of compliance standards, with government oversight of legal language alignment, is a smooth business investment for the test companies - but excludes the voices and values of the policy-users.

In Sweden the diversion of education taxes to private companies is much less advanced than in the US. The role of enforcing compliance standards taken by test companies in the US is now taken in Sweden by the Inspectorate and with similar issues of dissent from the policy-users. Chapter 31, by Christina Segerholm from MidSweden University, reports how the Inspectorate is now used to enforce 'good education' standards compliance of schools. The ability of schools to comply with standards depends, not only on what schools do but crucially on the social-demographic and the resource contexts of the schools – the un-voiced cultural identities of their demographics. However, in her study of "values in evaluation" professor Segerholm notes "resources or other local conditions are not of interest in the inspections and are not examined or taken into account in the decisions..." (p.814). She notes the different neo-liberal and local grass roots interpretations of 'good education' "The new inspection processes emphasize 'good education,' meaning following the rules, regulations, and instructions in the national policy documents

independent of local conditions. Furthermore, 'good education' is interpreted in line with what is put forward in research on successful schools. Indicators in the inspection are drawn from there and made into national requirements, as indicators for all schools." (p. 823).

In Chapter 32, Anna Siri from Genoa, Italy, relates some results of compliance standards that reduce education to monetarist values of employee-ment in her Chapter 'Health Professions Student Admission Policy in Italy: Linking Selection and Performance'. In particular, selection standards aim to predict course success. If standards of ethics and professionalism are not assessed for course success - and not compulsory for courses as described in Chapter 34 - then they have no need to be included in selecting students for course success. One result is "Moreover many students are not deeply motivated and tend to lose their interest in their future jobs very early. This is one of the main reasons why their drop-out rate is quite high." (p. 834). Similarly, in Chapter 33 'Essential Aspects in Technical Teacher Education', in an effort to cut down on students who become bored and inattentive, do tests poorly, get discouraged, and in some cases change to other curricula or drop out of school Tiia Rütmann and Hants Kipper from Estonia report the planning of an engineering curriculum to include ethical attitudes where teachers can be prepared to take responsibility for a sustainable, humane, socially and environmentally compatible contribution to shaping society - values excluded from employee-ment. However, in Chapter 34, Charles Mitchell from Troy University, Alabama, USA - who advertise themselves as the 'Best Buy in Education' - not surprisingly reports "the difficulty of teaching ethics in public administration" even though "clear 'mandates' for doing so that are found in NASPAA [National Association of Schools of Public Affairs and

Administration] and ASPA [American Society for Public Administration] guidelines” Interestingly, ethics courses are not a required element of all public administration curricula and Dr. Mitchel points as a result to “declining ethical standards” and to the “Scandals, examples of immorality and corruption in government abound throughout the nation.” (p. 876).

We finish this section on Standards with a suggested solution for reversing the monetarist trend of ‘turning the identity of universities into that of business corporations’ by moving the identity of corporations towards that of traditional civic responsibility and of sharing the traditional values of universities, so that organisations are judged not only by monetary standards but by civilised standards of traditional universities. In Chapter 35, Soudabeh Jalili and Golamreza Memarzadeh from Tehran, Iran, present, in their chapter on ‘Organizational Civilization’ alternative values that they say should define the cultural identity of an organisation – values such as ‘civilised’ features of “philanthropist, knowledge and specialty, order and law, social courtesy, organizational improvement, and organizational civilization behaviour” (p.892). Modelling corporate identities on universities, instead of turning universities into corporations, would go some way towards creating the modern business models of social responsible Civic Corporations and of Sharing Corporations for which the traditional university is the archetype cultural identity.

11.6 Editorial comments on Governance for and through Neoliberal Policy

Your education builds your identity. Education governance has become control over the building of a select ideal type of identity. Most of the chapters in this section stem from ‘grass roots’ dissatisfactions with the narrowing of government controlled mass education to that of mainly building cultural identities

of 'employee-ment', whereby the ideal cultural identity of the student is narrowed to that of being an employee. Each chapter relates critically to aspects of governance promoting monetarist processes and outcomes whilst disempowering wider grass root education values. This disempowerment stems from a lack of grass roots influence on policy which drives its enforcing resource-accountability cycle. In particular, the narrow criterion that legitimises authority of policy-makers, of resourcers and of accountability controllers - such as popularity at election time - is not directly supported by the processes of committed communication. The disconnect is so marked that layers of bureaucracy are intentionally created by policy makers to distance the influence of grass root values (Sultana, 2012, p. 363; Valsan, & Sproule, 2008, p. 949).

This has become a major issue because it has accompanied a major political change. The ideal of representative democracy perhaps lead to grass roots expectation of a Lockean 'state of nature' where traditionally the government oversaw a service of resource distribution which had been agreed through the voting system to represent all values of the electorate. This has now changed. Now, neoliberal Governments oversee a service of resource distribution which is modified by governance reforms to promote the values of government - simply ensuring that 'He who plays the piper calls the tune'. A detailed US\$1.7 Billion example of this process using compliance standards is mentioned in the introduction to Chapter 30 above. In addition, political cultural identity has become increasingly 'Elite' - in the sense of 'Elite and Counter-elite Theory' - with competitive self-interested values - in the sense of Mitchels' (1915) 'the iron rule of oligarchy' - which are quite different from the more altruistic values of grassroots' communities that they govern. The subterfuge of neo-

liberal governance, like Chomski's 'manufacture of consent/content', is to promote monetarist policies as though they are serving all community values.

Our section on education Governance is opened by Ana Elisa Spaolonzi Queiroz Assis and José Roberto Rus Perez, who in chapter 36, report on the judicial control of public policy education in the State of São Paulo, Brazil. Their report illustrates that committed communication is assumed by the grass roots users of education and ensured by a system of 'checks and balances' to which stakeholders should conform. However, Ana and José detail modifications to the system of governance through actions of the judiciary that seem to override these checks and balances to disempower the influence of grass root values. Chapter 37 reports on a similar 'take-over battle' to return to local control, after 15 years of state takeover of school governance in nine north-eastern cities of the USA. The local values are signified by indicators of increased public commitment to education; increased funding; lowered class size; increased stability; and against the diminished role for parents and community involvement groups. However, these policy-users, perhaps inconsistently, continue to accept the narrow employee-ment definitions of attainment as one indicator of local values.

Chapter 38 illustrates that governance in Singapore is embedded in a very different culture. All policy and behaviours to serve education policy are decided by government. The policy is to produce a population with the ideal cultural identity being 'productive workers for the economic good of the country'. Perhaps it is their non-European cultural history that frees them to be so publicly forthright. From the committed communication perspective the only degree of freedom is to seek population compliance by manipulating interpretations of mandatory policy

behaviours to align with the relatively homogeneous population values that have historically been cultivated. This is done through control of the media and direct fiscal and social rewards and punishments. Official policy discourse and media discourse work in combination to promote alignments of values, attitudes and purposes across all grassroots' stakeholders. The different problem in Singapore is that past government success in building commitment of the population to past policy reduces the speed of aligning established population values to new policy behaviours. This diffidence to change within fundamental acceptance is illustrated in Chua's chapter on '(Mis)Aligning of Values, Attitudes and Purposes of Education Reforms across Various Stakeholders in Singapore'.

Chapter 39 by Urška Štremfel and Damjan Lajh from Slovenia is reported more from the management perspective, nicely illustrating the neoliberal subterfuge. The chapter reports that the Slovenian governance systems in place, e.g. education financing, are similar to those of the EU so the grass root education communities already agree to follow essentially what are the systems of EU governance. However, although the bottom level policy-users already follow EU type governance systems they are not always aware of this similarity and believe that their systems are traditional. The chapter suggests that an awareness of this alignment would motivate lower end 'grass roots' policy-users to integrate more overtly and completely with the EU systems. The chapter does not emphasise notions of knowledge which are not instrumental to the EU neo-liberal conception of economic efficiency. In line with its management perspective the research for the chapter was financed by The Slovenian Research Agency (ARRS) which was established by the Government of the Republic of Slovenia (based on its decision taken

in 2003 - on the day after Christmas). The Agency's highest decision-making body is the Scientific Council which is totally appointed by the minister responsible for science.

(<http://www.arrs.gov.si/en/dobrodoslica.asp>).

In Chapter 40, authors Antonio Luzón, Miguel Pereyra and Mónica Torres use a critical analysis of the discourses that have presided the 'Bologna Process' resulting in a perception of this process as a large scale device promoting neo-liberal governance of a Spanish University. In contrast, Philip Garner and Fiona Forbes pool their UK and Australian perspectives to report an example of specialist interest group resource and process disadvantage and dissatisfaction - namely Principals from all sectors of the Australian school system as school leaders for students with special educational needs and disabilities (SEND). This chapter explores the potential impact of the understanding of school administrators/principals on the educational experiences of young people who identify with special educational needs and disabilities. The importance of leadership in school settings is well researched and widely accepted internationally. What is less understood is the part that school leaders play in framing the life chances of this group of young people and the pivotal part played by the principal's familiarity with the way that young people engage with the curriculum. Philip Garner and Fiona Forbes address these issues from an empirical perspective of Australian professionals. In our last chapter, Joanna Madalińska-Michalak presents an English/Polish comparative study of school leadership for poor disadvantaged schools - communities characterised by poverty and deprivation. The indicator of success is 'educational achievement of all children' and the process is leadership through shaping and utilising organizational culture. This study, like the study from the USA in chapter 37, does not question the definition

of educational achievement of all children as the enculturation of employment. Nor does it question the local or global competition for employment that will always ensure these communities, characterised by poverty and deprivation, will remain the most needy and exploited in society.

5. Acknowledgements

We are indeed fortunate to have safe and vicarious access through these chapters to the extremely varied rich professional cultural experiences and insightful commentaries of these multilingual educationalists. For many authors English is not their first, or second or even third language; yet they have made considerable efforts to share the different cultural qualities of their educational experiences with our English readers. In mono-lingual environments one social function of language is to judge the educational level of the communicator and to - perhaps rashly - infer the same level to the content of their communication. For example, spoken French can be learnt without formal education, but written French is so different that it is a social marker of formal education. To generalise this inference to judge the quality of content communicated in a multilingual context - such as this book - is a gross limitation of culturally cosseted monolingual speakers. The editors considered ninety-nine nascent research reports from central and peripheral world cultures which were ideally fitting expositions of comparative cultural perspectives on Education Policy. However, this publication process does not offer what our Aussie colleagues call 'a level playing field'; particularly with regard to equal access to resources - internet access, time and support for research, access to the cultural capital of Standard English, etc. Hence, the forty-two chapters in this handbook - each submitted to at least three peer-reviews for the different qualities of experiences presented - also stand for the authors of

the fifty-seven chapters who did not have the resources to meet the numerous rigours and deadlines of this publication - we must thank them. It is to our advantage that we find ways of giving them a voice.

5.1 Who are the seventy-six authors who have contributed to this book?

Authors who successfully negotiated the selection and review processes are listed, with their affiliations, at the front of the book. Figure 1 shows the twenty-three countries of the institutions with which our contributing authors are affiliated. The national representation of our contributing authors is much wider as universities often pride themselves on the diverse national origins of their faculty. Dr. Antonyan from Yerevan State University, Armenia who contributed chapter 2 is one of many examples of our authors' international work mobility. Kristine Antonyan was an Erasmus Mundus fellow in Greece in 2009 and was also a visiting professor at California State University, Fresno in 2010. Interestingly, in Chapter 23 professor of Education Kingsley Banya is somewhat critical of these mobility schemes.

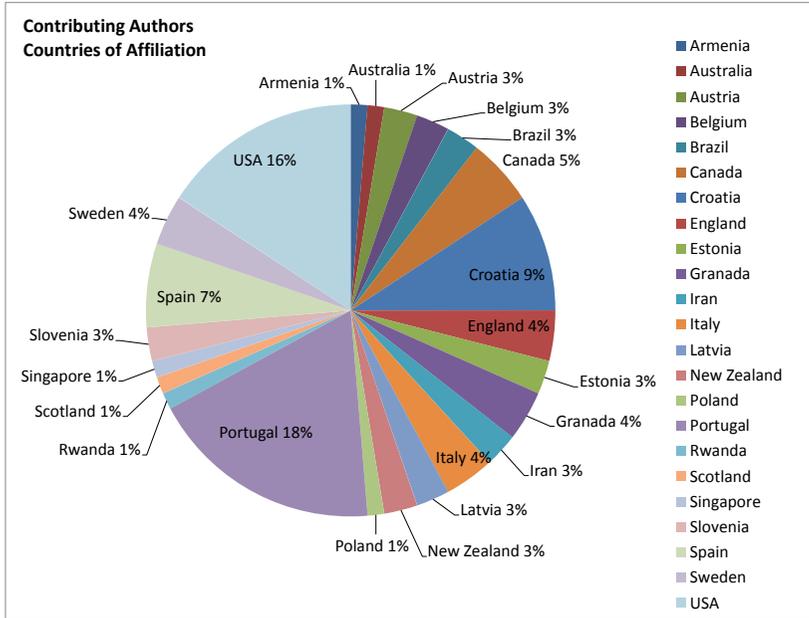


Figure 1: International affiliations of our contributing authors

Readers who would like this type of more intimate introduction to our authors will find brief BioPics listing such interesting background information from page 1297 near the end of the book.

5.2 Who are the International Board of Associated Editors?

Who are the fifty-seven international subject experts whose local and international knowledge and experience have guided the publication of this book? The members of the International Board of Associated Editors, including their affiliations are listed at the beginning of this book. The twenty-five countries of their affiliated institutions are illustrated in Figure 2.

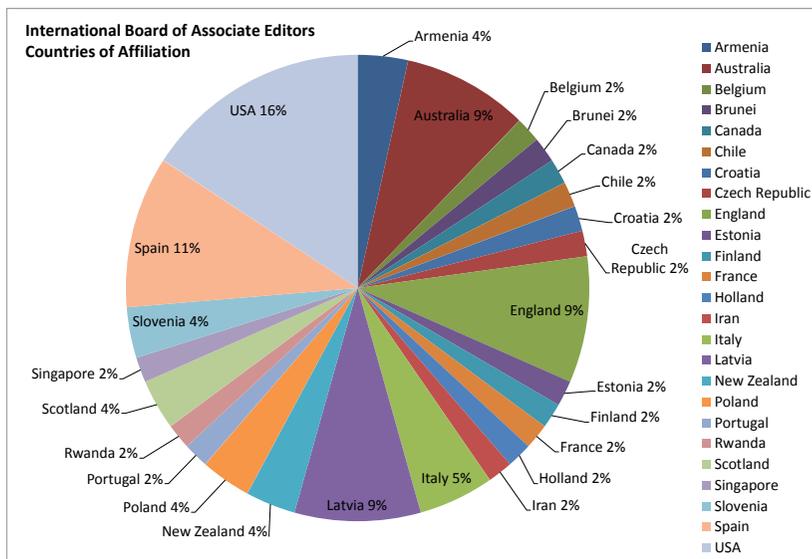


Figure 2: International affiliations of our Board of Associate Editors

Again, as with our contributing authors, and as befitting this International Handbook, the international representation of our Associate Editors is much wider than the countries of their institutional affiliations.

For those readers who are interested in the amazing range of academic expertise that has been graciously and freely given by these stewards of the Academy, we direct you to their interesting, and often surprising, credentials from page 1345, at the end of this book.

I would like to personally thank the in-house copy editors, my post-grad students who helped with the extensive editing chores, my colleagues worldwide for their local knowledge and cogent advice, and particularly my doctoral student Uta Rampersand who so accurately organised the initial internet communications on which the success of this extensive project has subsequently been built.

We must especially also thank our academic publisher, Analytrics, and our Series Editor Professor Guy Tchibozo, whose organisations have made this publication possible. Subsidised hardcopies of this book have also been made available at cost price for all researchers, education students, teachers, academics and specialist educationalists in our global academic community. These non-profit hardcopies are available from on-line bookstores and university bookshops worldwide. Electronic copies of the book, in colour, have also been made freely available for multiple download by courtesy of Analytrics. These copies can be conveniently electronically searched, quoted, cited and freely used under the 'non-commercial share alike Creative Commons world-wide usage'. This e-book can be downloaded freely from the resource pages of the publisher's website at:

<http://www.analytrics.org/Pages/EESENOtherEventsandResources.aspx>

Last, and perhaps foremost, we must thank you, our reader, whose interest has led you to this especially tailored book and new starting point for Education policy-outcome relationships. We trust as you now read this, that you can also move forward and use the Culturometric lens we give you to engender new visions of how you will enrich our world Cultures of Education.

Béatrice Boufoy-Bastick

Editor

Abbreviations and acronyms

- AfL - Assessment for Learning
- CoP - Community of Practice
- CSAUS - Cross-National Studies of Adult Understanding of Science
- EFL - English as a Foreign Language
- ESL - English as a Second Language
- ESOL - English for Speakers of Other Languages
- IAEP-II - International Assessment of Educational Progress
- IALS - International Adult Literacy Survey
- ICCS - International Civic and Citizenship Education Study
- ICT - Information and Communication Technology
- INES - International Indicators of Education Systems
- PIRLS - Progress In International Reading Literacy Study (e.g. PIRLS 2001, PIRLS 2006)
- PISA - Programme for International Student Assessment
- SPSE - Study on Performance Standards In Education
- TIMSS - Third International Mathematics and Science Study

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Volume 1

SECTION 1

POLICY MEANINGS AND USES OF ACHIEVEMENT

Section 1 Contents

Chapter 1	3
Gender Polemics, Achievement and the Policy-Research Gap: The Misalignment and Alignment of Stakeholder Positionalities Within a Global Education Policy Field and a Context of Neoliberal Governance <i>Wayne J. Martino & Goli Rezai-Rashti</i>	
Chapter 2	39
Armenian Higher Education Developments: Issues, Challenges and Opportunities <i>Kristine A. Antonyan</i>	
Chapter 3	59
How to Rebuild a Secondary School: Space, Knowledge and Education <i>Joana Marques, Luisa Veloso & João Sebastião</i>	

Chapter 4 **103**
Across and Within-School Variation in New Zealand Secondary Schools
Camilla Highfield

Chapter 5 **121**
Rethinking School Readiness and Transition Policy and Practice in Early Childhood Education (ECE): A Whole Schooling Framework
Lara Fridani & Joseph Seyram Agbenyega

Chapter 6 **155**
Building Local Networking in Education? Decision-Makers' Discourses on School Achievement and Dropout in Portugal
Helena C. Araújo, Florbela Sousa, Armando Loureiro, Isabel Costa & José Portela

Chapter 7 **187**
School Achievement in Urban and Rural Areas in Croatia: Is the Quality of Education Equal for All?
Josip Burusic, Marija Sakic, Toni Babarovic & Ivan Devic

CHAPTER 1

GENDER POLEMICS, ACHIEVEMENT AND THE POLICY-RESEARCH GAP: THE MISALIGNMENT AND ALIGNMENT OF STAKEHOLDER POSITIONALITIES WITHIN A GLOBAL EDUCATION POLICY FIELD AND A CONTEXT OF NEOLIBERAL GOVERNANCE

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Abstract

In this chapter we draw attention to the manifestation of a particular gender polemic in policy making surrounding the global phenomenon of *failing boys* and the achievement gap. We situate this renewed focus on the persistence and reconstitution of *failing boys* as an object of policy making within a global education policy field that is understood in terms of the governance turn in policy sociology in

education. This turn is characterized by a neoliberal imaginary with its culture of accountability within state policy regimes. We challenge the notion of 'failing boys' by drawing on both literature in the field pertaining to the achievement gap, and the particular case of equity policy in Ontario as it relates to targeting boys. We also discuss the specific case of Portuguese students in urban schools in Toronto who have been identified as having the highest drop out rate and use it as a counter-narrative to the official inscription of all boys as a disadvantaged category in the Ontario Ministry of Education's *Equity and Inclusive Education Strategy*. Our aim is to draw attention to the extent of the misalignment of the policy-research nexus and various stakeholder positions at play in debates about gender achievement gaps.

Keywords

Failing boys – policy-making – neoliberal governance

Introduction

Concern about the crisis of 'failing boys', or what Titus (2004) identifies as 'boy trouble', has persisted since the early 90s in countries such as Australia, Canada, the United Kingdom, the United States and Europe (Epstein, Elwood, Hey & Maw, 1998; Martino & Meyenn, 2001; Francis, 2006; Weaver-Hightower, 2003; Froese-Germain, 2006; Kloss, 2011). Kloss (2011) for example, in citing recent PISA results, claims that Europe's boys are wet behind the ears in that they easily fall behind girls in their understanding of writing and speaking, without exception, in every member country of the OECD. Both in Europe (though not in France) and elsewhere (see Moreau, 2011), boys continue to be identified in these terms as the 'new disadvantaged' with their underachievement or failure being pitted against the educational success of girls (Lingard & Douglas, 1999; Ringrose, 2007; Skelton & Francis, 2009). In this chapter we challenge the notion of 'failing boys' by drawing on both

literature in the field pertaining to the achievement gap in urban schools and a specific case of Portuguese students in urban schools in Toronto who have been identified as having the highest drop rate. We employ both this case and literature in the field as a basis for interrupting policy related discourses about the designation of *failing boys* as a homogenous group. Such research and critical analysis is important, we argue, given the persistence of a policy discourse which refuses to engage with key literature in the field that points to the need to disaggregate performance data on the basis of race, ethnicity and social class. Such a critical positionality highlights that a focus on boys or gender per se cannot fully explain or account for why certain groups of boys or girls are underachieving (AAUW, 2008; Mead, 2006; Martino & Rezai-Rashti, 2012). As Archer & Francis (2007) point out, the problem is that “issues of race/ethnicity have been subject to a pernicious turn in policy discourse” and, hence, eclipsed by competing concerns about underachieving boys (p. 24). The result has been a failure to address how other factors, such as social class, race, ethnicity, sexuality, geographical location *intersect* with gender in significant ways to impact on specific groups of boys and specific groups of girls in terms of their achievement.

This fundamental *misalignment* raises important issues about the policy-research gap and points to a particular gender polemics within the broader context of the global education policy field (Lingard, 2011; Grek, 2009). Research literature which attends not only to numbers, but also to the contextual specificity of schooling and other sociodemographic factors in terms of their capacity to build knowledge and insight into the complexity and intersectionality of variables that come into play to impact on student achievement is important in addressing this misalignment (Lingard, 2011; Lucas & Beresford, 2010). Equally important in

this contested policy field of achievement gaps and what Gillborn (2008) refers to as 'gap talk', is need for critical appraisal of how policy makers are deploying a discourse of closing or narrowing achievement gaps as a means by which to deny the reality of "locked-in equality", particularly in relation to the persistence "Black/White inequality of achievement [as] a permanent feature of the education system" (p. 68). In fact, both Power and Frandji (2010) in the UK and Lingard, Creagh, and Vass (2012) in Australia illustrate the extent to which policy as numbers, as driven by forms of neoliberal governance in the education field, has contributed to powerful instances of *policy misrecognition*, which has resulted in the displacement of a politics of distribution and a failure to attend to racial inequality in terms of bleaching any contextual analysis of schooling and the reality of the impact of material disadvantage on student participation and achievement in schooling. In short, such policy articulation, in terms of 'gap talk' and use of numbers, displaces a commitment to addressing and tackling "the underlying causes of educational failure" related to what Power and Frandji identify as the "uneven educational outcomes" for various minority and economically disadvantaged populations that can best be explained in terms of "maldistribution" (p. 394).

In this chapter we highlight the extent to which talk about the gender achievement gap, as it is manifested in the articulation of a discourse about *failing boys* needs be understood in terms of such a fundamental displacement and misrecognition of the problem of unequal attainment. What is needed, we argue, is more sustained policy engagement with an informed research base and explanatory frameworks that attend to the theoretical bases underpinning what Lucas and Beresford (2010) refer to as "the categories in use" deployed in the framing of policy discussions on

education and inequality, specifically as they pertain to questions of socioeconomic status, race, ethnicity, gender, and sexuality:

... empirical research offers little to social analysts and policy makers: theory is essential for drawing proper inferences from the research. Yet the wide set of plausible theories, and strategies of analysis that are not designed to eliminate nonviable theories, can ultimately render social science evidence of little value to policy (p. 26).

In this chapter by drawing on both the empirical and theoretical literature pertaining to *failing boys* and the gender achievement gap we highlight the problem of misrecognition and displacement in the *failing boys* policy discourse and the nonviability of certain theoretical frameworks that underpin the authoritative assertions about the constitution and reconstitution of boys as the *new disadvantaged* within the limits set by what has been termed by Ball (2012) as a neoliberal imaginary (Lingard & Douglas, 1999).

1. The global policy field and the governance turn: *Failing Boys* as target of policy making

The particular polemics about *failing boys* needs to be understood in relation to the imperatives of globalization and the governance turn in terms of the neoliberal education policy regime that has come to define the nature of policy making within the field of education (Rizvi & Lingard, 2010; Ball, 2008). Lingard et al. (2012) explain this move from government to governance in these terms:

This involves three interrelated elements: the instantiation of new public management to produce a de-regulated yet re-regulated state through steering at a distance, the enhanced involvement of the private sector in public policy

through privatisations, public/private partnerships and the like, and a rescaling of governance to include what might be seen as global policy fields. This transition from government to governance has had significant implications for policy making in education within the nation ... the strengthening of particular technologies of governing, which in turn have been reframed by the dominance ... of neoliberalism (Ball, 2008) and the rise of the related audit culture within state policy regimes (Power, 1997). Ball (2008) writes of new managerialism, markets and performativity as the three central technologies of governance within education within this neoliberal education policy regime. (p. 315-316)

In Canada, manifestations of such an audit culture within state policy regimes have been evident in terms of the influence of both the Ontario Ministry of Education's mandated EQAO (Education Quality and Accountability Office) standardized test score data, PCAP (Pan-Canadian Assessment Program) reading assessment results and comparative PISA (Program for International Student Assessment) achievement data. In Ontario, such sources are drawn on by many stakeholders, in addition to the Ontario Ministry of Education, such as School Boards, the public media and certain education corporations, to establish that there is indeed a gender gap in reading achievement in favour of girls. For example, the Canadian Council on Learning (CCL, 2009), an independent non-profit corporation, funded by the Canadian government, refers to both PISA and PCAP assessment results as evidence for this claim and directs readers specifically to the Ontario Ministry of Education's Boys' Literacy web page. The familiar trope of boys as an undifferentiated category informs the use of such statistics and there is a bleaching of any analysis of context specificity and intersectionality in the discourse about narrowing the achievement gap in

reading achievement. In fact, what emerges here is a manifestation of what Ball (2012) terms “policy mobilities” and networks in which global, national and local accountability regimes intermesh and are drawn on by various stakeholders in such a way as to further legitimate *failing boys* as a particular target of policy intervention.

We see evidence of such policy manifestations elsewhere across the globe, with boys emerging as a target of neoliberal education policy making in the UK (Francis, 2006), Australia (Lingard, Martino & Mills, 2009), United States (Tyre, 2008; Weaver-Hightower, 2008) and across other OECD countries, with international comparisons serving as a basis for further ranking high performing nations within the context of the global market place (OECD, 2010). Such accountability regimes, we have argued, have played a major role in creating the enabling conditions that have led to boys being officially inscribed in equity policy by the Ontario Ministry of Education as a disadvantaged group, alongside visible minority, immigrant and special needs students (Martino & Rezai-Rashti, 2012). It is in this sense that numbers have been used to both steer education policy and to define the terms of what is to count as evidence and equity in official policy at the Ministry of Education level in Ontario, producing what is clearly a misalignment, displacement and misrecognition of maldistribution on the basis of economic disadvantage and racial minority status for both boys and girls in the education system (Fraser, 2000; Luke, Green & Kelly, 2010; Power & Frandji, 2010). Such an insertion of boys into official equity policy needs to be understood as enmeshed in political policy making processes that have been influenced by both recuperative masculinity politics involving a backlash response, a neoconservative impetus to reassert and reclaim certain notions of essentialized masculinity

and a neoliberal regime of accountability in which numbers have functioned to serve such neoconservative and recuperative masculinity interests. Media influences, in the form of exerting pressure from outside the education bureaucracy (Levin, 2004; Lingard & Rawolle, 2004), have also had a significant role to play in fueling a particular policy agenda around boys as particular sorts of normalized subjects whose learning styles, dispositions and needs are reduced to a question of biology and brain-sex differences. In this capacity the media functions as a key stakeholder in both motivating and driving the terms that govern this particular *policyscape*. It is in this sense that the formulation of equity policy from within the Ministry of Education, in responding to both pressures from inside and outside the bureaucracy, constitutes an instance of what Ball(1994) identifies in policy making as both “an authoritative allocation of values” and the “operational statements of values” (p. 3).

The media, therefore, cannot be ignored in terms of the role it plays in “flattening out diversity” (Luke, 2011, p. 375), especially in terms of enabling the space of gender equity to be colonized by a discourse of *failing boys* (Lingard, 2003; Keddie, 2006). For example, the official release of the PCAP results was announced by the public media with Canada’s national newspaper, *The Globe and Mail*, reporting not only on boys’ declining literacy, but also on the fact that boys have now fallen behind in science (Hammer, 2011). A month earlier, the same newspaper had devoted a whole week to the topic of *failing boys*, which was identified as one of the eight most pressing challenges facing Canadians, alongside the future of the military and the provision of public healthcare. For example, the first article introducing the topic begins with the following assertion: “There’s a new gender gap in education: Around the world, boys rank behind girls by

nearly every measure of scholastic achievement” (Abraham, 2010). Splashed across the bottom of the two full-page feature article is a series of graphs drawn from the 2006 PISA (Program for International Student Assessment), which disaggregate achievement data solely on the basis of gender for science, reading and math across a number of OECD countries, including Canada.

What becomes immediately apparent is the casting of *failing boys* as a global phenomenon beyond the national confines of the Canadian context. Here we see evidence of a *mediascape* (Appadurai, 1990) in which the interplay of national and the global forces are mobilized around the recuperative masculinity interests of proliferating a particular social imaginary about boys as the ‘new disadvantaged’ on the world stage. For example, a consultant from one school board is reported as saying that “the pendulum has swung too far” in favour of girls, with a strong sense being conveyed in such media reports that boys are being “disregarded” and left to “find their own way in a feminized education system” (Abraham, 2010). The capacity of the media to mobilize and give voice to a range of stakeholders to orchestrate a particular ideological alignment is a significant feature of the mediatization of a particular policyscape in its capacity to consolidate the political agenda of a specific gender polemic as a basis for reinstating and further reinscribing the terms of gender problematization. As Foucault indicates (1988):

Problematization doesn’t mean representation of a pre-existing object, nor the creation by discourse of an object that doesn’t exist. It is the totality of discursive or non-discursive practices that introduces something into the play of truth and false and constitutes it as an object for thought (whether in the form of moral reflection,

scientific knowledge, political analysis, etc). (p. 257)

It is in this sense that the failing boys discourse functions within a regime of truth in which boys are constituted as particular sorts of subjects and as targeted objects of a specific policy technology (Ball, 2008), with the effect of flattening out diversity and with implications for what is to count as both evidence and equity (Luke et al., 2010).

2. Addressing the misalignment: Engaging with a more informed research based literature

As already stipulated, discourses about 'failing boys' need to be understood within the context of the relevant scholarly literature, the rise of standardized testing regimes and media publicity related to the gender achievement gap in schools (Lingard, 2003), which in turn form part of a particular *policyscape* involving specific technologies and regimes of truth. It is in this sense that the policy-research gap in the field of boys' education can be best understood and explained, particularly in terms of explaining the terms of the alignment or misalignment of stakeholder positionalities. From the mid 90s debates and concerns about the problem of underachieving and under-performing boys in schools have garnered significant media and policy attention (Francis & Skelton, 2005; Froese-Germain, 2006; Weaver-Hightower, 2008). Epstein et al. (1998), in writing about '*failing boys*' indicate that the nature of such public debates have acquired status "as a kind of globalized moral panic", which has resulted in alarmist responses that have eschewed a more thoughtful and informed assessment of the problem of underachievement (p. 3) (see also Mahony & Smedley, 1998; Lingard et al., 2009; Davison, 2007). Such panics, while not new, have intensified since the 90s

with boys being cast as "the new disadvantaged" (Lingard & Douglas, 1999). Moreover, this focus on boys has resulted in what Weaver-Hightower identifies as 'the boy turn' in terms of "a distinct and growing shift towards examining boys' education" internationally (Weaver-Hightower, 2003, p. 472). Scholars in the field have identified different discourses about boys and schooling which have informed these debates, such as: (i) the 'poor boys', where boys are presented as victims of feminism and increasing feminization; (ii) 'failing schools *failing boys*', where standardized test scores are used as a narrow measure to identify '*failing boys*' and to blame schools for their failure without addressing other cultural and structural factors and (iii) 'boys will be boys', where boys' learning styles are presented as innate and biologically determined or related to brain-sex differences. These discourses highlight the extent to which such frameworks for explaining boys' underachievement are politically motivated, informed by different theoretical positions and unsupported by a solid research base (Epstein et al., 1998; Connell, 2000; Kimmel, 2000). Francis and Skelton (2005), for example, reiterate that these various discourses on boys and achievement "do not recognize the differences experienced by boys because of their diversity in terms of social class, ethnicity, culture, sexuality, religion, or age" (p. 49). In addition, Griffin (2000) argues that such debates which draw on these explanations have been "constituted through a discourse of crisis and loss" and have tended to marginalize or ignore how issues of race and class impact on achievement (p. 167). Furthermore, Mead (2006) claims that the "so-called boy crisis" is built on a "lack of solid information" and that while "there are a host of statistics about how boys and girls perform in school, we actually know very little about why these differences exist or how important they are" (p. 14).

As Mahony and Smedley (1998) have reiterated “the terms of the debate need to be shifted so that they are not based on simplistic, essentialist assumptions about women and men ... the range of femininities and masculinities which young people inhabit are not fixed but neither are they limitless: they change over time, in relation to region and nationality and they are ordered in hierarchies through racism, homophobia and class prejudice, producing a complex web of power relation” (p. 49) (see also Davison, 2007; Frank, 1993; Martino & Pallotta-Chiarolli, 2003). This is consistent with Noguera’s (2003) call for more research on black and Latino males who continue to be over-represented at the “lower rungs of the achievement ladder”: “Patterns of achievement suggest that race, class and gender are related to academic performance ... However, we know relatively little about the subjective dimension of this phenomenon or how awareness of these patterns might affect how students see themselves” (p. 51).

Kimmel (2000) and Sadker (2002) have also highlighted the extent to which a media generated ‘boy crisis’ has been cast in terms of a *gender war* in which girls’ interests are pitted against those of boys (Hoff-Sommers, 2000). Titus (2004) also explicitly draws attention to the role the media has played in inciting public anxieties and an incendiary discourse of ‘moral panic’, particularly in terms of its capacity to assemble “descriptions” of failing and poor boys as “factual accounts” which become “authorized as scientific knowledge” (p. 146). The effect of such accounts, he claims is to avoid treating achievement as a “complicated phenomenon where race, social class, and gender intersect” (p. 149). Francis & Skelton (2005) point out that such positions are informed by both ‘poor boy’ and ‘boys will be boys’ perspectives and rely on certain common-sense understandings about boys as essentially different

from girls. The result of subscribing to such a worldview, as Kimmel (2000) argues, is that it leads to fundamental and problematic “misdiagnoses of the cause of the crisis” (p. 1) (Jones & Myhill, 2004).

Recent policy initiatives emphasizing accountability, choice and market mechanisms have had a profound impact on educational systems (Rezai-Rashti, 2009). Weaver-Hightower (2009), for example, highlights that a market driven climate of standardized testing has enabled an intensified focus on the gender achievement gap in its capacity to illuminate boys’ lower test scores as a basis for mobilizing a particular boys’ education policy agenda. This has not only resulted in funding being directed disproportionately to addressing boys’ underachievement (Mills, Martino, & Lingard, 2007; Ontario Ministry of Education, 2004; Weaver-Hightower, 2008), but has also eclipsed any focus on how the persistence of structural inequalities related to race/ethnicity and social class continues to impact on specific groups of girls and specific groups of boys (Archer & Francis, 2007; Osler, Street, Lall & Vincent, 2002). Ringrose (2007), for example, argues that ongoing panic over *failing boys*, which relies on a celebratory discourse about successful girls is associated with a policy drive to raise standards in education, while eschewing a consideration of structural inequalities related to race, ethnicity and social class (see also Francis, 2006). Such literature highlights the extent to which policy makers and governments, as stakeholders, use both statistics and literature about boys selectively to mobilize a discourse about achievement gaps, a discourse which is also fuelled by the media. We have witnessed particular manifestations of such gender polemics in nations such as Australia, Canada, the United Kingdom and the United States (Mills et al., 2007; Titus, 2004; Francis, 2006; Weaver-Hightower, 2008).

Francis and Skelton (2005), for example, claim that “the way in which statistical data on examination performance is read and subsequently presented to the public can be misleading” (p. 73). The interpretation of such statistical data to prove that boys are underachieving, they argue, actually “misrepresents the situation” (p. 74). One of the major concerns documented in the field is that a focus on *failing boys* as a seemingly homogenous group has actually produced a distorted view of the achievement gap that exists between boys and girls (Lingard & Douglas, 1999). Moreover, literature such as that produced by Gorard, Rees, and Salisbury (1999) provide a critique of the way in which boys’ underachievement is actually measured and reported. As Connolly (2008) points out, “this work has certainly made an important contribution in terms of questioning the ways in which gender differences have tended to be calculated and reported by politicians and the media showing how this can result in a misleading and distorted picture” (p. 250).

It is important to emphasize that such debates about the use of statistical data highlight the extent to which it is important to examine other sorts of achievement gaps in terms of race, ethnicity and social class which are far greater than the gender gap in achievement (AAUW, 2008). Mead (2006), for example, provides NAEP reading achievement statistical data from the United States disaggregated by race and gender. She concludes that the gaps between students of different races and classes are much greater than the gender achievement gap and that “when racial and economic gaps combine with gender achievement gaps in reading, the result is disturbingly low achievement for poor, black and Hispanic boys” (p. 9). AAUW (2008) also found that “children from the lowest income families have the lowest average test scores” and that both African American and Hispanic children scored

lower than their white and Asian American counterparts (p. 3). A five-year study conducted by the Toronto District School Board has tracked high school students through Ontario's new four year curriculum according to race/ethnicity and family income of its student population and recorded similar findings (TDSB, 2006). Those students identified as being most at risk of failing or 'dropping out' of school are those born in English-speaking Caribbean, Central and South America/Mexico, and Eastern Africa. Specifically those students from Portuguese, Spanish speaking and Somali backgrounds are identified as being more likely to fail the Grade 10 EQAO Literacy Test, not middle-class boys. These findings, based on disaggregating performance data, are consistent with research conducted elsewhere outside North America where the race achievement gap has been identified as being much more significant than the gender gap (Archer & Francis, 2007; Gillborn & Mirza, 2000).

In this chapter, therefore, important questions are raised about the evidentiary basis for many of the claims that persist about *underachieving* and *failing boys* in schools. It is not that some boys are not experiencing problems in schools and that there are issues of masculinity which need to be addressed (Martino, 2008). A more thorough engagement with the literature in the field is needed, particularly given the politics informing *evidence-based policy* and *policy-based evidence* as they pertain to boys' education and the gender achievement gap (Lingard et al., 2009; Mills et al., 2007; Weaver-Hightower, 2008; Martino & Rezai-Rashti, 2012). In fact, this research-policy gap raises serious questions about the differing paradigms and their impact in terms of identifying and explaining the educational phenomena of *failing boys* and, hence, for setting the terms or limits for both thinking about and addressing the problem. In this sense, the gap between policy related claims that are

grounded in a discourse about boys as 'the new disadvantaged' and a failure to weigh all of the research evidence raises troubling questions about "which scientific evidence, whose sciences, whose interpretations" count (Luke et al., 2010). Engagement with a broader research base reveals that while gender is an important factor or indicator in helping to make sense of students' engagement with schooling, gender per se cannot fully explain or account for why certain groups of boys or girls are not performing well in schools. There is clearly a need to disaggregate statistical data when examining gender gaps in school achievement (see AAUW, 2008; Mead, 2006). What is required is a more informed understanding of *which boys* and *which girls* are most at risk in the school system (Martino, 2008). In addition, in following Connolly (2008), it is evident that such statistical analysis needs to be informed or complemented by qualitative research and analytic perspectives that are capable of elucidating both the cultural and structural dimensions of educational disadvantage for specific groups of boys and girls (Francis & Skelton, 2005; Fraser, 1997; Martino & Rezai-Rashti, 2012; Noguera, 2008). In short, is it is how we both define the problem of boys' education and their 'underachievement' as well as understand the context of such policy making related to addressing the problem that requires critical attention. As Luke et al. (2010) point out:

Not surprisingly, the demand for evidence has opened a Pandora's Box of arguments over the appropriate grounds for documenting and analyzing student socioeconomic, cultural and linguistic background, student performance and achievement, systemic delivery of resources, school type and structure, and school and teacher practices. It is axiomatic that any policy "fix" or strategic approach is contingent on how the problems, target populations, variable

contexts, and factors are defined and parcelled out and observed, represented and measured, and analyzed. (p. viii)

The problem with the current media focus and policy approach to addressing the gender achievement gap is captured by the failure to account for other differences that intersect with gender to impact significantly and differentially on groups of boys and girls vis-à-vis their achievement and participation in schooling (see Martino & Rezai-Rashti, 2012). For example, the Quebec Ministry of Education's (2005) report on the influence of socioeconomic environment on academic success and the gender gap draws attention to the fact that "differences in academic success rates for boys vary more from one school board to the next than they do between groups for boys and girls" (p. 1). Furthermore, U.S. Department of Education's (2009) report on achievement gaps stresses the need to "examine relationships between students' performance and various background factors measured by NAEP [National Assessment of Educational Progress], such as race", but further qualifies that such statistical data are "most useful when they are considered in combination with other knowledge about the student population and the education system, such as trends in instruction, changes on the school age population, and societal demands and expectations" (iv) (see also TDSB, 2010).

3. The significance of theory: Beyond homogenizing boys

Significant research in the field of boys education (Davison, 2007; Lingard et al., 2009; Weaver-Hightower, 2008) and specifically that related to boys' engagement with literacy (Alloway, Freebody, Gilbert & Muspratt, 2002; Rowan, Knobel, Bigum & Lankshear, 2002) highlight the need for more

empirical research that is capable of investigating not only the home and school correlates of learning, but also the pedagogical implications of certain strategies for addressing achievement gaps and the theoretical basis for justifying such interventions (see also Younger & Warrington, 2005). Alloway & Dalley-Trim, (2006), for example, advocate for a critical framework that is capable of addressing the problem of applying theories that tend to treat boys' orientation to learning and literacy in essentialist terms as somehow determined or fixed by their biological sex (see also Rowan et al., 2002). They argue that these populist and policy related explanations about boys' poorer literacy performance have tended frequently to draw on "biology and role model theory", and in turn have become so naturalized and taken-for granted, with such frameworks being embraced unreflectively by stakeholders such as parents, educators and policy makers (p. 10) (see also Martino & Rezai-Rashti, 2012). Consequently, Alloway & Dalley-Trim (2006) emphasize that biological explanations, including those that resort to endorsing brain-sex differences, often tend to "obscure the scientific evidence on which the explanations are based" (p. 10) (see also Eliot, 2009). For example, they highlight that claims about boys' being right-brained and girls being left-brained, which are based supposedly on undisputed evidence about the functioning of the brain vis-à-vis cerebral lateralism (right and left brain functioning), cannot explain the differences that exist amongst groups of boys in terms of their approaches to learning:

This theory connecting brain laterality with gender and literacy outcomes cannot account for the fact that groups of boys who have high levels of social and economic resources available to them consistently outperform groups of girls – and other boys – who do not have access to the same resources. Social rather than neurological

dimensions of living and learning may come to count in these instances. (p. 10)

Elsewhere, Alloway et al. (2002) argue that the ways in which boys engage with literacy, for example, are often determined by how they learn to relate to others and understand themselves. Such relations, in turn, they emphasize, are influenced by questions of culture and identity that cannot be reduced to biological sex differences. For instance, it has been argued that boys' fine motor skills are not as developed as those of girls in the early years which, for some, explains why boys tend to have more difficulty with mastering the 'biomechanics' of learning to read and write, such as holding a pencil and turning a page etc. However, Alloway et al. claim:

There is no attempt to explain why biomechanics of pencil grip might be under-developed, and yet the fine motor skills required for electronic game playing so well-developed. Just as ball throwing and other gross motor skills are sometimes underdeveloped in girls through lack of practice, it may be that the fine motor skills required for early writing may be underdeveloped in boys for the same reason. (p. 55)

As Younger and Warrington (2005) argue, "the 'boys' under-achievement debate' ignores the diversity of gender constructions which exist within schools and societies, and within which boys and girls operate" (p. 171). Their chapter on learning styles highlights the extent to which unreflective approaches to implementing a more boy-friendly curriculum are grounded in theoretical perspectives which adhere to brain-sex differences in schools (see Gilbert & Gilbert, 1998). Support for these approaches has been accompanied by a consultancy industry in boys' education which promotes brain-based learning initiatives that stress the need to cater for boys' distinctive learning styles, despite "the limited

evidence base" (p. 75). The work of such consultants have been drawn on quite deliberately by stakeholders such as school boards, Ministries of Education and governments to lend support for policy making initiatives related to school based pedagogical reform designed to cater for boys' distinctive learning styles and needs. This is in spite of other research evidence which has found "no significant correlation between gender and preferred learning styles" (Younger & Warrington, 2005, p. 77), and supports Mead's (2006) assertion that "the so-called boy crisis" feeds on "a lack of solid research evidence" or rather on a research base that is "internally contradictory, making it easy to find superficial support for a wide variety of explanations but difficult for the media and the public to evaluate the quality of evidence cited" (p. 14).

4. The case of Portuguese students in Toronto

Focusing on specific groups of students who are most at risk of dropping out or graduating from high school has the potential to provide a more nuanced analysis into the range of socio-demographic factors that are working in tandem to impact significantly on student achievement. Stakeholders, such as school boards in Ontario, have access to such disaggregated data. The TDSB in 2006 and 2008 produced reports which highlighted that specific populations of students such as those from Portuguese speaking backgrounds have the highest dropout rates in the school system. Other groups such as Somali students, students from the English-speaking Caribbean and Middle Eastern backgrounds, as well as those from Spanish speaking backgrounds, were also identified as being at risk. The *Toronto Star* featured a major article which cited this report with the head-line, "Dropout, failure rates linked to language" (Brown, 2006). Other articles also appeared in subsequent years in the *Globe and Mail* newspaper with headlines emphasizing a race

achievement gap: "Race gap recorded in classroom performance: School board calls for action to help improve test results of black, Latin American and Middle Eastern origins" (Bonoguore & Hammer, 2009). In spite of such coverage and attention to empirical evidence which indirectly pointed to the politics of misrecognition associated with the tendency to focus exclusively on the gender achievement gap, the Ontario Ministry of Education (2009), with the release of its *Equity and Inclusive Education Strategy*, inserted boys as category of disadvantage alongside Aboriginal students, children from low income families, recent immigrants and students with special education needs (p. 5). This is significant, given that school boards in Ontario and all schools are expected to use this strategy as a basis for developing and revising existing policies on equity and inclusive education.

The Ministry's focus on boys is rendered even more problematic in light of statistics and specific research in the field, which draws attention to the underachievement and at risk status of Portuguese students in the education system in Ontario. For example, the available research shows that the Portuguese community continues to be marginalized in Canada and that Portuguese speaking Canadians "still display the highest percentages of individuals with only a primary school education" (TDSB, 2011, p. 2; see also Nunes, 2004). In fact the TDSB (2011) reports: "Furthermore, their proportion of university and college graduates is equal to those of the Canadian Aboriginal communities" (p. 2). Numbers are also available which identify the Portuguese speaking community in Canada as one of the identified groups experiencing significant disadvantage in education, employment and income (Ornstein, 2000):

Almost 70% of Portuguese immigrants aged 25 and older had not graduated from high school and more than half had not attended high school

at all. Furthermore, amongst the European immigrant groups, the Portuguese had a strikingly high proportion of young people not in school and not high school graduates (29%); only 3.6 % of Portuguese were University graduates. (TDSB, 2011, p. 3)

What is particularly striking about the case of Portuguese students in cities such as Toronto is that third generation students from the community have one of the highest dropout rates in the school system, and, as Nunes (2008) points out, are not progressing beyond their parents' socio-economic positions. This is confirmed by statistics released by the TDSB in 2006, which revealed that Portuguese students had the highest drop out in the education system at 43%, followed by Spanish speaking students at 39% and Somali speaking students at 37% (TDSB, 2006, p. 15). These three language groups are identified by the Toronto District School Board as being most at risk in Grade 9 in terms of their achievement in the school system. Interestingly, the TDSB (2011) report draws attention to the fact that Portuguese youth in Portugal also have the lowest mean TIMMS score out of all Western European countries and draws attention to the fact that 57% of Portuguese parents do not have any secondary education (p. 6). Both the TDSB and other research by Nunes (2008) draws significant attention to the salience of social class, as well as to the significance of the migratory experience for the Portuguese speaking community in Canada. For example, Nunes indicates that many of the Portuguese in Toronto are disproportionately from the poorest rural regions in Portugal and have the lowest levels of education of any minority group. In fact, Nunes (2008) points to a range of factors that contribute to the Portuguese-Canadian dropout rate that he attributes to an amalgam of intersecting factors including cultural, class and linguistic barriers related to the valuation of work over education, the inability of

parents to be able to assist their children with educational decisions and schoolwork, given both their non-English speaking background and lack of financial resources, and school system barriers related to the effects of streaming and low teacher expectations. The research by Nunes, however, indicates that the most detrimental consequences of dropping out are mediated by a strong family support system. This available literature related to the Portuguese-speaking school population in Toronto draws attention to the problems of an emphasis on achievement gaps which hyper-visualizes the singularity of gender (Martino & Rezai-Rashti, 2012). For example, it highlights the crucial significance of the need to consider ethno-cultural and social class influences which help to explain how notions of being Portuguese are tied to a working-class status that is defined in opposition to being educated. In this sense, the Portuguese case in Toronto points to the need to attend to a more accurate documentation of the socio-demographic data that paints a more informed and detailed picture of the nature of inequality in the school system. Such literature, moreover, also draws attention to the need to consider carefully the conceptual framing and theoretical basis of the categories in use and, how such framing both governs and determines the explanatory power that is attributed to numbers that are being used in their potential to either refuse or reinforce the reductionist tendency of the focus on the singularity of gender and, hence, *failing boys*.

In Toronto, a key stakeholder in addressing the fundamental issue of the situation of Portuguese speaking students in Toronto schools has had a major role to play in re-directing some attention and resources of the school board away from a singular focus on gender to one which attends to the salience of social class and ethno-cultural influences in their capacity to impact on student achievement and

participation in schooling. For instance, a board trustee of Portuguese background with a long history of activism in Toronto, has been a key player behind the instigation of the *TDSB Taskforce on Success of Portuguese Speaking Students*, comprising of educators and professionals from within the Portuguese community. This trustee, as chair person of the Taskforce, worked actively to ensure the Taskforce's official legitimacy within the TDSB. In fact, the taskforce has had a major part to play in directing and steering the board's initiatives to address and enhance the achievement of its Portuguese-speaking students. Such action has not only resulted in the board deploying resources to consult with parents, teachers and students from Portuguese speaking backgrounds, the TDSB has also produced a review of relevant research and literature, which has served to ground subsequent recommendations and action (TDSB, 2011). For example, the TDSB officially passed a series of recommendations at one of its board meetings on February 27, 2012, stipulating the provision of material resources and support to Portuguese students and families which entail the allocation of funds for the appointment of a full-time community liaison worker dedicated to working with the Portuguese speaking community to improve academic achievement of Portuguese speaking students (TDSB, 2012). A full-time Student Equity Program Advisor position to advise Portuguese students in the TDSB has also been approved, along with support for professional development for educators to enable them to become more culturally responsive to the needs of Portuguese-speaking students.

Overall, the Taskforce has been instrumental in drawing attention to the need to focus on a range of factors and variables that intersect in their impact on the Portuguese speaking population such as the

history and flows of immigration, teacher expectations, social class, the cultural valuation of work over education, ethno-cultural identity and gender. While there is an acknowledgement that Portuguese speaking boys have drop rates that are higher than their female counterparts, there is strong sense that gender per se cannot explain or be allowed to eclipse the complexity and multi-faceted dimension of school achievement and participation in the labour market for this particular community. In this specific case, there is evidence of some alignment with the board trustee/Taskforce and the school board in its commitment to addressing achievement on the basis of disaggregation beyond gender as a sole indicator of achievement. The TDSB has also instigated further inquiry into the achievement of Somali and Spanish speaking students. This case illustrates how both numbers and critical frameworks which refuse to isolate out the singularity of gender as a sole determinant in the framing and setting the terms for understanding achievement gaps, are central to addressing the fundamental politics of misrecognition at the heart of the gender polemic of the *failing boys* policy discourse. In addition, this particular case highlights the important role of a board trustee as a key stakeholder with insider status and knowledge of the history of the Portuguese community and its struggles, as central to influencing action and policy within a district school board in terms of addressing fundamental questions of equity and social justice as they relate to enhancing the achievement of Portuguese speaking students. This is in spite of the broader gender polemics involving the emphasis on boys as a colonising force in both policy formulation and debate about achievement gaps at both the provincial, national and global levels.

Conclusion: The limits of a neoliberal imaginary

In this chapter we have drawn attention to the politics governing the policy-research gap as it relates to prevailing global discourses about *failing boys* and their iteration and impact at the local and national levels in the Canadian context. Our aim has been to illuminate the terms of such a gender polemic which we illustrate cannot be fully understood outside of a consideration of the influence of neoliberal governance, with its culture of accountability permeating every level of policy making. By highlighting the fundamental gap between research based evidence and the global policy phenomenon of *failing boys*, our concern has been to explicate how particular stakeholder interests and their alignment with a neoconservative and neoliberal agenda involving policy as numbers can help to explain such a misalignment and a politics of misrecognition as displacement in terms of bleaching context from a more incisive analysis of achievement gaps, thereby diverting attention away from economic injustices and the politics of race and ethnicity. Set against such a critical analysis of the global education policy field within a context of neoliberal governance, we also discussed the emergence of boys as a disadvantaged category as it is manifested in the Ontario Ministry of Education's official equity policy, designed as a steering mechanism for all schools in the province who are required to develop and revise iterations of existing school based equity policies. While the Ontario Ministry of Education's equity policy aligns closely with the limits set by the terms of a neoliberal imaginary, we use the specific case of the underachievement of Portuguese students in the Toronto District School Board and the role of a board trustee as a particular stakeholder, to explicate the building of a productive partnership resulting in a crucial alignment with the potential for subverting the fundamental politics of

misrecognition at the heart of the prevailing policy rhetoric and media generated *failing boys'* discourse. We have also drawn attention to the significant role of the media as a key stakeholder in both motivating and driving the terms that govern this particular *policyscape* of *failing boys*, particularly in terms of homogenizing and normalizing the category of boys, with the effect of flattening out diversity. Ultimately, it is an understanding of contextual specificity and political relations of stakeholders at the local level and how these relations are mediated and impacted by broader macro forces of globalization in terms of their capacity to influence audit cultures within state policy regimes that we have wanted to draw attention to in this chapter. By studying the various alignments and misalignments between stakeholders at all levels of the policy field, a more complex picture of the politics of policy contestation and iteration can be garnered.

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CHAPTER 2

ARMENIAN HIGHER EDUCATION DEVELOPMENTS: ISSUES, CHALLENGES AND OPPORTUNITIES

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Abstract

Aiming to create a democratic society, Post-soviet Armenia is relentlessly working to improve its economic, political and social institutes. During the last decade the Armenian economy showed a rapid growth. However, the quality aspects of this growth couldn't be described as sustainable, since it wasn't based on Total Factor Productivity (TFP) growth. Nevertheless, research on distinct competences of Armenian economy outlined three growth factors: people in the society, who value knowledge and higher education (VE), human capital (HC) and a large and entrepreneurial Diaspora (D). However, considering the challenges related to the the Bologna process, that Armenia has recently joined, the quest for an efficient educational policy is becoming critical for sustaining and improving the aforementioned competences. According to a survey performed among students of two Armenian HEIs, the

resulting outcome of Bologna process might be a new wave of educational migration among students. This fact changes the qualitative and quantitative interrelation between VE, HC and D, enriching the more knowledgeable people of the Diaspora. Further development of the endogenous growth model indicated that to gain a long-run sustainable growth, the country needs to rely not so much on the financial investments from Entrepreneurial Diaspora, but more on knowledge transfer. To succeed we need to establish new collaborative networks among various stakeholders, including public, private, research, non-government sectors and the knowledgeable Diaspora.

Keywords

Armenia – Long-Run Growth – Education

Introduction

In 1956, Robert Solow in his neoclassical growth model assumed that the flow of output is produced by the cooperation of two factors: the currently employed stock of machines and the currently employed labor force. Technologically efficient input-output combinations are described by the production function. Hence, the “technological change” - any improvement in capital or education of labor force exogenously describe the long-run growth (R. Solow 1956, 1957). Furthermore, the growth models changed their development path to endogenous model designs and development. According to the new approach, the human capital (HC) endogenously described the long-run growth (Lucas 1988; Mania, Roomer, Weil 1992, etc.). P. Roomer (Roomer 1990) outlined that HC accumulation leads to economic growth through two channels: R&D and consumer goods production, thus indicating that a country’s innovation base is viewed as another primer factor leading to its development. Based on the endogenous models, further theoretical developments indicated that the improvement of institutes (North 1990, Hall and Jones 1999, etc.) as

well as Information Communication Technologies (ICT) (D. Chen and Keep 2005) serves as a necessary condition for the country's long-term growth and development. In the endogenous models, all those factors lead to growth through Total Factor Productivity (TFP) growth. The World Bank Knowledge Assessment Methodology estimates the country's Knowledge-Based economic development through four pillars: Education, Innovation, ICT and Institutions. These four could also be viewed as TFP factors that explain the sustainable growth (D. Chen and C. Dahman 2005).

We use the endogenous growth models to indicate that the educational policy may become a key attribute for the sustainable development of the Armenian Economy.

$$Y = A(t) * F(K(t) * H(t) * L(t)) \quad (1)$$

Based on (1), we outline two channels that would lead to an increase in output in the long-run: improvement of $K(t)$ (capital accumulation) and $H(t)$ (HC accumulation). While observing the Armenian economic trends over the last decade, we came up with the three main components, or competitive advantages, that determine the economic growth. These include people in society who value knowledge and higher education (VE), HC and a large and entrepreneurial Diaspora (D). On the other hand, considering the fact, that Armenia became a full member of the Bologna Educational reforms process in 2005, we show that currently the country faces a new challenge of qualitative and quantitative modifications in the observed comparative advantages and their interrelations. In the light of these transformations, the role of educational policy for the country's sustainable development becomes increasingly important.

Methodology

We employ the concept of endogenous growth model aiming to attain long-run sustainable growth for the Armenian economy. For that purpose at first we separately observe the country's economic and educational backgrounds and outline the areas that could become potential competitive advantages that the country would be able to sustain. We then put forward the proposition that the Bologna process leads to the creation of incentives that subsequently trigger the migration among the youth (students in particular). We proved this hypothesis with the survey conducted in November 2009. We developed the endogenous growth model for the Armenian economy, segregating two policy channels in the mathematical model. Firstly, we analyze the impact of the massive capital investments in innovative technologies and business processes, and then proceed to HC development in accordance with global market demands (i.e. with appropriate knowledge, skills and competences). Viewing these two variable separately helps us to better understand their cumulative impact on the country's long-run growth. Based on the results, we make policy suggestions.

Economic background

After the collapse of the Soviet Union, Armenia faced complex issues, such as war, the consequences of a devastating earthquake, a continuous blockade from Turkey and Azerbaijan and general economic crisis stemming from the sudden disruption of traditional business ties with the rest of the Soviet republics. All these factors caused an increase in poverty (up to half of the population) and subsequently led to massive migration. The programs undertaken by the government and supported by international institutions and the Armenian Diaspora helped Armenia to survive during that early transition period.

Despite the initial challenges, the economy started to grow rapidly during the last decade (expressing two-digit growth before the global financial crisis that hit the Armenian economy in 2008-2009). During this relatively prosperous period foreign direct investments (FDI) were the main source of growth in the Armenian economy. However, the world economic crisis didn't bypass the country and the economy significantly deteriorated. The crisis made it explicit that the growth that Armenia had been enjoying during the 2000ies was not sustainable since it wasn't based on TFP growth. In most cases, the knowledge based resources were not employed within Armenian industries' value chains. Knowledge resource was not performing its role of the main engine for high value added productions that contribute to the long-run sustainable growth.

Diaspora has had an important role in attracting FDI. A research by a local NGO revealed that during 1998-2004, approximately 25% of total FDI coming to Armenia were Diaspora-related investments (DRI) (Economy and Value, 2006). However, during this period the volume of the annual DRI showed a declining trend (in 2002 it was reversed after the targeted events in 2001 that boosted DRI)¹.

The research also points out that the motivation to make an investment in Armenian economy depends on whether the investor is Armenia or a Diaspora-born individual. The investments made by Diaspora-born Armenians are driven by the investor's "patriotic feelings" toward his/her ancestral land.

¹ The research is ending with 2004 year observation. Though the FDI is continually increasing, we think, that the estimated decreasing trend of DCI hasn't changed after 2004.

This type of DRI is business related and knowledge/technology intensive in its nature and thus more conducive to sustainable long-term growth of the economy.

However, Diaspora-born investors' emotional attachment to Armenia tends to diminish with time and so do their DRIs. On the other hand, the investments made by Armenians who only recently joined the Diaspora have a short-term impact on the economy even though the DRI made by Armenia-born investors exceeds that of the Diaspora-born investors and is mostly expressed in monetary terms rather than knowledge or experience as it is the case for the Diaspora-born investors.

Therefore, we may conclude that (1) the ethnic Armenian Diaspora is considered to be a strategic asset for Armenia's economic development. However, the monetary component of the DRI is going to diminish with time (we would term this as an investment "motive" in our mathematical model), (2) the Armenian economy needs structural reforms that will lead to long-term sustainable development.

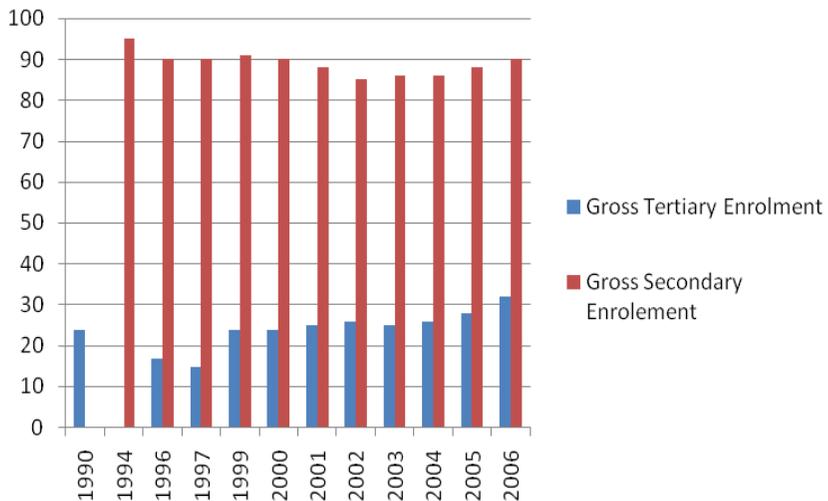
Educational Background

Starting from ancient times, Armenians have had a penchant for education and knowledge. In the 5th century, they created a national alphabet and started developing educational institutions. The next time period, which we call the Soviet Period, was critical for further economic and educational development. During the Soviet years, education became accessible to wide public with its developed secondary school and afterschool educational systems. Consequently, despite the fact that Armenia lacks natural resources, its HC stock significantly contributed to the Soviet Union economy.

After the collapse of the Soviet Union, Armenia inherited a well developed **HC stock**: 14 percent population with a higher educational background, about half with afterschool special education and almost 100% literacy rate. However, the challenge was to maintain the system and adjust it to the requirements of an emerging market economy during the country's economic transition. The significant outcome of the early transition period was the qualitative and quantitative deterioration of HC stock.

Figure 1 illustrates the ratios of total enrollment into secondary and tertiary education (i.e., total enrollment of the population of the age group that officially corresponds to the level of appropriate education).

Figure 1. School Enrolment in RA (% gross)



Source: World Bank, WDI

During the economic growth of the last decade, the tertiary enrollment, as one of the main growth endogenous factors, started to increase rapidly, because of the increased number of alternative educational institutions (private and foreign universities and their branches), new programs

designed for all kinds of demands (short-term, distance, evening etc.), economic growth and poverty reduction (on average up to 25%) and traditional Armenian **educational values**².

Starting in 2005, Armenia became a full member of the Bologna process. The Ministry of Education and Science, as the central regulator of the system, implements the strategic plan of educational reform in accordance with Bologna guidelines. One of the strongest Bologna tools is considered to be the mobility of students and researches. It plays an important role for the overall performance of education and science systems as well as for the EU economic performance³.

Proposition: "In an effort to gain a 'brain circulation' within Europe, the intention to promote greater mobility may cause a new wave of migration among the youth (students in particular) from Armenia to the EU countries. We call this educational migration. As a consequence, the students migrating to study abroad would actually be joining the existing Diaspora enriching it with more knowledgeable individuals with high potential.

² However, the Educational qualitative indicators indicate deterioration of the national educational system. According to the Global Competitiveness Index (GCI) 2010-2011, Armenia is ranked as the 115th for its "quality of education system" and 68th for its "tertiary education enrolment rate" out of 139 countries. Source: The Global Competitiveness Report 2010-2011, WEF

³ Despite of the recent technological growths and virtual collaboration opportunities, it is considered, that "without functional mobility it is not possible to speak of a true European Research Area, where researchers, technology and knowledge circulate freely across EU". Source: "*Cross-border Mobility of Young Researchers*", Directorate General for Internal Policies. Policy Department A: Economic and Scientific Policy, October, 2009,

<http://www.europarl.europa.eu/activities/committees/studies/download.do?language=en&file=27511> (27/01/2011)

Hence, we think that the educational transformations taking place within the scope of Bologna process have a critical meaning for the Armenian education, making the present time period a turning point for the economic long-run development of the country.

Survey. To confirm this proposition, we surveyed students, asking about their willingness to continue their education abroad and their further intentions in this regard. Since it was extremely time-consuming and costly to implement the survey for the whole higher educational system, we narrowed the sample to the biggest institutions --the Yerevan State University (YSU) and Gladzor University (GU). For the sake of consistency of the research methodology, it should be noted that the actual findings of the research could have been different had we been able to survey non-Yerevan students. Nevertheless, since most of the Armenian HEIs and students are centralized in Yerevan the main assumption may not be affected in our opinion (See Appendix 1, Table 1.1).

The survey was implemented in November, 2009⁴. We interviewed 374 students, from which 324 were from YSU and 50 from GU. 49.3 % of the interviewed YSU students were studying humanitarian studies and 37.4 % - natural studies. The remaining 13.3 % were from all the departments of GU.

According to the results, 92.1% of the students interviewed expressed willingness to continue studying abroad. In case they manage to do so, 25.2 % wanted to continue working and living abroad and 21.4% were

⁴ I express my gratitude to my 2009-2010 academic first year master students, who undertook the survey in the context of the team project "The Internalization of Education", which was their team assignment in the framework of the course "Innovation Management and Economics", I taught. The results of the survey are also available in the course blog: <http://ysumba09.blogspot.com/2009/12/survey.html#more>

not sure. The first-hand evidence of the survey allowed us to assess the **validity** of the following assumptions. The significance of the findings is 90%.

Assumption 1. Target group 1 (participated in International Educational Development Program (IEDP) vs. Target group 2 (didn't participate in IEDP)

More than half of the students who participated in any kind of IEDP (i.e. have studied sometime abroad, target group 1), would like to continue their education abroad without intention to return. On the other hand, almost half of those who didn't participate in IEDP (target group 2) either wouldn't return, or would hesitate to return. (See Appendix 3, Table 3.1). However, more than 90% from both target groups would like to continue their education abroad (59.3% to pursue a degree, see Appendix 2, Table 2.2), which means that the overall satisfaction with the national education level is low.

In most cases the Armenian national education system is incompatible with the demands of the national and international labor markets. Armenia's inclusion to the Bologna process would increase scope of various educational programs and financial schemes for Armenian students. This in its turn would possibly boost the migration of students, a process that we term as **educational migration**. Consequently, the educational migration will affect the two valuable assets of the Armenian economy: HC (through brain drain) and Diaspora. The educational immigrants will expand the Diaspora, enriching it with more knowledgeable individuals and thus contributing to its knowledge/technology intensive DRIs. The local educational system and human capital stock would possibly lag behind though both in terms of quality and quantity. Consequently, this would affect the country's

long-run sustainable development opportunities. For the purposes of the growth model, we will express these factors as educational "motives" in our mathematical equation.

The model. Modifying the production function (1), we get (2) as the output per capita ($Y' = Y / L$ ⁵).

$$Y' = A(t) * F(K(t) * H(t)) = A(t) * K(t)^\alpha * H(t)^{1-\alpha} \quad (2)$$

Where K is the Capital, H is the human capital stock and the A is the TFP. The further modification of (2) will change it to a linear function (4).

$$\ln Y'(t) = \ln A(t) + \alpha \ln K(t) + (1 - \alpha) \ln H(t) \quad (3)$$

$$\frac{\partial \ln Y'(t)}{\partial(t)} = \frac{\partial \ln A(t)}{\partial(t)} + \alpha * \frac{\partial \ln K(t)}{\partial(t)} + (1 - \alpha) * \frac{\partial \ln H(t)}{\partial(t)} \geq 0 \quad (4)$$

For recording long-term sustainable economic growth, it's necessary to have a $\frac{\partial \ln K(t)}{\partial(t)}$; $\frac{\partial \ln H(t)}{\partial(t)}$ and $\frac{\partial \ln A(t)}{\partial(t)}$ growth at the same time ($\alpha \geq 0$, since the correlation of independent and dependent variables is positive).

Case 1. The capital will grow if the investments in capital surpass its deterioration. Since we assume that the existence of Diaspora is an important FDI

⁵ D. Mankiw, D. Romer, D. Weil, A Contribution to the Empirics of Economic Growth, The Quarterly Journal of Economics, Vol. 107, No. 2 (May, 1992), pp. 407-437, S. Baier, D. Gwyer, R. Tamura, How Important Are Capital and Total Factor Productivity for Economic Growth?, (April, 2002).

motivator, we express the Capital factor with the Diaspora FDI "motive", other investments' "motive" and Capital stock at t (K_n).

$$K(t) = K_n * d * a^t * b^t = K_0 * d^t * a^t * b^t \quad (5);$$

Where K_0 is the nominal rate of capital, $d^t \leq 1$ is the annual capital deterioration rate, $a^t \leq 1$ is the Diaspora investment "motive" (we assume, that the annual Diaspora investments are constantly decreasing), b^t is the other investments "motive".

$$\ln K(t) = \ln(K_0 * d^t * a^t * b^t) = \ln K_0 + \ln d^t + \ln a^t + \ln b^t \quad (6)$$

$$\frac{\partial \ln K(t)}{\partial t} = \partial \ln d^t + \partial \ln a^t + \partial \ln b^t = \frac{d^t * \ln d}{d^t} + \frac{a^t * \ln a}{a^t} + \frac{b^t * \ln b}{b^t} =$$

$$= \ln d + \ln a + \ln b \geq 0 \quad (7)$$

$$\ln b \geq -\ln d - \ln a \quad \text{and} \quad b \geq e^{-\ln d - \ln a} \quad (8)$$

Consequently, as the Diaspora is becoming less entrepreneurial on the one hand while the Diaspora's share of investments in FDI is declining on the other hand, the Government should make more efforts to obtain other sources of capital investments according to (8), rather than Diaspora investments.

Case 2. The national HC may grow of the HC stock deterioration is less than HC inflow. Since we outlined that the Diaspora is becoming more knowledgeable, we assume that the HC may change not only with domestic, but also with Diaspora HC inputs. Hence, we

express the HC with the available stock in the economy, domestic and Diaspora "motives" for its change (both qualitative and quantitative).

$$H(t) = H_{t-1} * h * f^t * g^t = H_0 * h^t * f^t * g^t \quad (9)$$

Where H_0 is the nominal rate of HC, $h \leq 1$ is the annual HC deterioration rate, $g \geq 1$ is the Diaspora investment "motive", $f \leq 1$ is the domestic HC inflow "motive" (we assume, that the annual domestic HC inflows motive is constantly decreasing, based on the survey findings).

$$\ln H(t) = \ln H_0 + \ln h^t + \ln f^t + \ln g^t \quad (10)$$

$$\frac{\partial \ln H(t)}{\partial(t)} = \frac{\partial \ln H_0}{\partial(t)} + \frac{h^t * \ln h}{h^t} + \frac{f^t * \ln f}{f^t} + \frac{g^t * \ln g}{g^t} =$$

$$\ln h + \ln f + \ln g \geq 0 \quad (11)$$

$$\ln g \geq -\ln h - \ln f \quad \text{and} \quad g \geq e^{-\ln h - \ln f} \quad (12)$$

Consequently, as the Diaspora is becoming more knowledgeable, while domestic HC inflow "motive" is declining as more and more students prefer to leave to more attractive countries for living and studying, the Government should make more efforts to increase the "motives" of the Diaspora according to equation (12). This includes utilizing the Diaspora for knowledge

transfer into the Armenian economy and educational system. Creation of strong networks, collaborative platforms, promotion of collaborative research, educational courses, organization of scientific (educational) events and projects among the domestic and Diaspora scholars will certainly create competitiveness within the national higher education and scientific systems and thus increase the educational system quality.

Case3. To ensure the country's movement to a knowledge-based economy and sustainable development, the further improvement of institutions, ICT and innovative bases is indispensable. These are the *necessary (but not sufficient)* conditions for securing long-run sustainable development and TFP growth.

Policy suggestions

As we saw, Armenia needs to implement fundamental changes in the educational system, since only then the country will have sufficient conditions for a long-run sustainable growth. For that purpose it needs to create and develop appropriate platform that will improve the quality of education as well as create conducive environment for knowledgeable individuals of Diaspora to share their knowledge and skills with their colleagues in Armenia. To succeed in this regard, it would be sufficient to establish durable and efficient collaboration among the HEIs and their stakeholders, which are businesses, public and research institutions, NGOs and Diaspora.

The forms and opportunities of the collaborative networking are as follows:

1. The educational programs of local universities should be aligned with the needs of local businesses. For that matter, a common platform where these

issues could be discussed should be created under the auspices of HEIs and business associations or NGOs. The mentioned platform could be structured as university department specially dealing with these issues.

2. The R&D capacity of the local HEIs should be boosted via intense cooperation with the businesses for their mutual benefit. The universities would gain expertise and knowledge, while businesses would have an opportunity to test new technologies without committing significant investments. In this case, a university's would serve many companies in exchange for some contribution.

3. The capacity of currently existing pan-Armenian associations of various professionals should be fully utilized via more intense meetings, knowledge transfer and experience sharing. These associations should reintegrate the potential of both Armenian and Diaspora specialists.

4. The educational joint programs may be established with different world leading universities through the Diaspora. The best professors with Armenian origin from the world's leading universities may be invited to lecture in Armenian HEIs.

Overall, the strong collaboration will increase the quality and weight of the local educational system.

Conclusion

- The last twenty years of economic survival and subsequent development of an independent Armenia are mostly the result of three comparative advantages that the country possesses: people, who value knowledge and higher education, HC and a large and entrepreneurial Diaspora.
- The Armenian Diaspora is considered to be a strategic asset for Armenia's economic development.

Diaspora has always expressed interest in investing in the national economy. However, the monetary component of the Diaspora Related Investments is going to diminish with time.

- The study of Armenian economy reveals that the recent economic growth wasn't based on TFP and thus couldn't have a long-run nature. The national economy needs structural reforms that will lead to long-term sustainable knowledge-based development.
- From 2005 Armenia is a full member of Bologna process. The survey conducted among the students of HEIs estimated that the process causes a new wave of "educational migration". The educational immigrants will expand the Diaspora, enriching it with more knowledgeable individuals and thus contributing to its knowledge/technology intensive DRIs.
- The long-run growth model estimates, that the Diaspora expresses a decreasing "motive" to invest. On the other hand, to reach a long-run development, the country needs to pursue a policy, according to which the Diaspora's "motive" for knowledge transfer will increase.
- To succeed in this regard, it would be sufficient to establish durable and efficient collaboration among the HEIs and their stakeholders, such as businesses, public and research institutions, NGOs and Diaspora. Furthermore, educational programs of local universities should be aligned with the needs of local businesses, while the capacity of currently existing pan-Armenian associations of various professionals should be fully utilized. It should also be noted, that joint educational programs between leading universities would also foster the knowledge-based growth.

Appendix 1.

Table 1.1. Number of Armenian HEIs and Distribution of the Students enrolled in 2009-2010 Academic Year.

	Yerevan	non-Yerevan		Yerevan	non-Yerevan	Total
Number of Students in Public HEIs (thousand)	73.3	18.6	Number of Students in Private HEIs (thousand)	19.5	3.2	114.6
In YSU (percentage)	19.1		In Gladzor (percentage)	6.7		25.8
Number of Institutions and Branches (thousand)	19	16	Number of Institutions and Branches (thousand)	41	13	89

Source: NSSR, Socio-Economic Condition 2010;
http://armstat.am/file/article/sv_03_10a_5200.pdf

Appendix 2

Table 2.1 Survey Statistics

Descriptive Statistics	percentage
1. International Educational Programs (IEP, the students' overall familiarity)	61.3
US Programs	
STATE DEPARTMENT PROGRAMS	54.8
European Programs	
ERASMUS	17.6
TEMPUS	19.8
DAAD	30.3
Other	
State Programs (through the Ministry of Education and Science)	23.4
University Level Programs (through Department of International Relations)	22.2
2. Information Sources	100
University Relevant Departments	19.1
Internet	63.4
International Organizations	0
Ministry of Education and Science	7.4
Other	10.1

Table 2.2 Survey Statistics

Number of Bachelor and Master Students interviewed	374
Descriptive Statistics	percentage
1. Desire to Participate in IPDP	92.1*
2. Kind of Desired IPDP	
Short-term Non-Degree and Visiting Programs	40.7
Degree Programs	59.3
3. Financial Sources	
International Funds	57.2
State Budget and Funds (Luys)	37.9
Personal	4.9
4. Tried to Participate in IPDP	33.2
5. Intension to Return to Motherland After IPDP Opportunity	53.4**
Target group 2 (Number of students, that had had a Participation in an International Professional Development Program, IPDP)	125
Descriptive Statistics	percentage
6. The Satisfaction from IPDP	100
Totally Contributed to the Professional Development	28.2
Partly Contributed to the Personal Professional Development	18.6
Stimulated to Develop the Further Career out of Armenia	53.2

* The rest interviewed, who wouldn't like to continue studying and living in Armenia think, that the domestic Educational System provides the adequate knowledge and skills which local markets' demand

** From the rest 46.6% 25.2% would like to develop further career abroad, 21.4% declined to answer.

Appendix 3

Table 3.1 Target Group 1 vs. Target Group 2

	Target Group 1	Target Group 2
Would like to participate in EDP	96.1%	93.7%
After EDP wouldn't return to Motherland	53.2%	12.3%
Not sure about return	7.8%	28.1%

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CHAPTER 3

HOW TO REBUILD A SECONDARY SCHOOL: SPACE, KNOWLEDGE AND EDUCATION

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Abstract

This chapter discusses the Secondary School Modernisation Programme (SSMP) in Portugal, coordinated by the state-owned company *Parque Escolar*, and the attitudes and perceptions of the different social actors with regard to the relationship between space, knowledge and learning. It focuses on the process of setting up and implementing the programme in the context of the recent transformations in secondary education in Portugal and on its evaluation by architects, school boards, teachers and pupils, the main stakeholders in this process. The methodology includes content analysis of the documents, interviews and focus groups, and the descriptive and multivariate analysis of questionnaires. This analysis involves discussion of the

policy, as expressed in the programme, and its outcomes, as expressed in the main stakeholders' positions. It examines the different social actors' perspectives on the learning principles in the programme in order to reveal to what extent there is common ground between them and how the architecture of learning environments has an impact on learning processes. The empirical discussion closes with an analysis of the impact of school renovation on learning.

Keywords

Urban education - School architecture – Knowledge - Stakeholders

Introduction

After a long period of lethargy, Portuguese secondary education confronted the degradation and inadequacy of its school facilities. In 2007, the Ministry of Education launched the Secondary School Modernisation Programme (SSMP), an ambitious renovation programme costing EUR 2.45bn for the first 205 schools. This resulted in one of the most important measures in the Portuguese education system today, in terms of investment and the general mobilisation of society. The SSMP is based on the assumption that the quality of school buildings is one of the driving forces in improving education, a strategic element in constructing a culture of learning and the dissemination of knowledge and in promoting equal access to education. To implement and manage this programme, a state-owned company was created: *Parque Escolar* (PE).

Under this unprecedented programme in Portugal, an evaluation-research project was set up in 2010 to analyse how the spaces are being used and to what extent the physical learning environment supports innovative educational practices. The central concern of the study was to explore the importance of schools

as learning environments, given the politically established principle of equitable access to education and the centrality of knowledge and learning processes in contemporary societies. The aim was to evaluate the impact of the SSMP on socio-educational and urban dynamics, the use and appropriation of the new spaces, and the perceptions of the various social actors involved.

The process of school renovation within the SSMP generated a complex process of dialogue and discussion between PE, the school board, the architects, the teachers, the pupils and the local community about the aesthetic and functional options and their educational and pedagogical implications, with conflicting positions often emerging. The research issue developed in this chapter involves an analysis of how the various social actors in the renovation process relate to each other, how they discuss and share the changes introduced by the programme and whether such changes have consequences on teaching and learning practices. At stake are the social actors' perceptions of the relationship between knowledge, education and space.

The chapter starts by outlining the theoretical and methodological framework and presenting the educational policy context in Portugal and the recent transformations in secondary education. It continues by examining the learning assumptions of the SSMP and comparing them with the perspectives of architects, school boards (principals and school council presidents), teachers and pupils. The discussion focuses on three main conceptions of the SSMP: the library as the heart of the school; the creation of a learning street; and the opening-up of the school to the community. To attain this aim, two schools are studied: one in an urban and another in a semi-urban location. The schools studied, like most Portuguese

secondary schools, are situated in urban areas, but they vary significantly in their position in the national territory.

In an analysis of school renovation processes, it is essential to evaluate, on the one hand, the changes in educational practices, including the changing characteristics, roles and attitudes of the social actors directly and indirectly involved, and on the other, the mechanisms of appropriation of the space by these actors – “the school appropriated” (Herzberger, 2008, p. 74). These assumptions are the basis for the consideration of the organisation of the educational spaces (not just the classroom, but all the spaces in the school) and the reflection on the conceptions of education and learning, with a discussion of the role played by the architects to create the spatial conditions to support the teaching, by promoting new spatial organisation and (re)defining its uses. However, changing the space is not synonymous with changing teaching practices and the schools are not isolated from the territorial and social contexts that contribute significantly to their structure.

1. Theoretical framework

1.1. The social functions of space and architecture

The process of school renovation falls within a debate on the role of architecture in the configuration of schools, beyond the physical dimension, which implies the recognition of the social function of architecture. In sociology, the study of space goes back to the beginning of the twentieth century when Simmel proposed a sociological approach to space in two articles published in 1903 (“On spatial projections of social forms” and “The Sociology of Space”, in Frisby & Featherstone, 1997). He attempted, on the one hand, to stress the importance of space in social life and, on

the other, its processes of transformation, from the social dynamics that are generated within it. Even so, it was only in the sixties that this debate emerged as a topic of sociological research (Bourdieu, 1958; Lefebvre, 1974; Foucault, 1975).

It is essential to consider the fact that "by giving shape and form to our material world, architecture structures the system of space in which we live and move. In doing so, it has a direct relationship – rather than a merely symbolic one – to social life, since it provides the material preconditions for the patterns of movement, encounter and avoidance which are the material realisation – as well as sometimes the generator – of social relationships. In this sense, architecture pervades our everyday experience far more than a preoccupation with its visual properties would suggest" (Hillier & Hanson, 1993, p. ix). Therefore, it is essential to understand built space as "a relational pattern, a pattern of distinctions, separations, interfaces and connections, a pattern that integrates, segregates, or differentiates its parts in relation to each other" (Peponi & Wineman, 2002, p. 271).

The use of space cannot be limited to a set of functional practices; it also includes an ideal dimension, made up of social representations, myths and rites, a set of spatial arrangements and built forms that constitute the identity of an urban community (Pinson, 1993, pp. 107-108). Hence, it is crucial to link architecture to the social sciences. Gieryn (2002) points out how "buildings stabilise social life. They give structure to social institutions, durability to social networks, persistence to behaviour patterns" (2002, p. 35). It is essential to understand that architecture plays a role in social life through its contribution in the configuration of spaces. Therefore, it is important that architects know the specificities

and 'logics' of the social relationships that characterise the spaces in which they intervene. This is particularly relevant in the case of school spaces. As Herzberger states, "If there is one area where making space presents a special challenge for architecture, it is in designing schools" (2008, p. 20).

1.2. The architecture of learning environments

School architecture is a vital part of the learning environment, supporting dynamic learning processes, both materially and socially. It is important to ask how a given school space functions as a pedagogical instrument, as "places can serve as effective teachers", but they can also obstruct the learning process if they are inadequate (Gislason, 2007, p. 6). The school building is a physical structure but it also transmits visual messages of how to feel and act there, helping (or not) to create the right conditions for the learning dynamics.

Several studies indicate that the architecture of learning environments influences teaching and learning processes and the enhancement of those facilities can improve educational performance and outcomes. The extent of that influence, however, remains unclear (Cramer, 1976; Lackeney, 1994; Schneider, 2002; Higgins, 2005).

We cannot address this relationship without considering the links with education policy options, which have resulted, according to some authors, in the relative uniformity of school buildings over time, preventing their transformation. It was only at the close of the 20th century that we saw divergence from the standardised type; until then, only the form moved with times, not the spatial organisation (Herzberger, 2008, p. 11).

Reflecting on school architecture also implies considering how it is linked with the conceptions and theories of learning developed over time, in an attempt to understand if they remain in a traditional mould or, conversely, indicate transformations in this area. At the base of the literature on school architecture is a conviction that educational spaces embody the pedagogical philosophies of their designers (Monahan, 2002). Referring to aspects ranging from the "tacit curricula" of the subjects and the conformity embodied in a classroom with neat rows of desks bolted to the ground, to flexible spaces personifying pedagogies of freedom and self-discovery, Monahan calls these architectural embodiments of educational philosophies *built pedagogy*, which operates along a continuum between discipline and autonomy. At the autonomy pole, he places open classrooms where individuals appropriate space according to their perceived needs. Uptis (2004), however, considers that school buildings perpetuate a classical 'transmission' model of learning, favouring the teaching of "core" subjects like mathematics and languages over others such as music, art, dance and gardening. "It's not that the teachers do not want to do more with the arts or teach children more about the natural world: often they simply cannot do so with the buildings and grounds at their disposal" (Uptis, 2004, p. 21).

To Uptis, the entry into the twenty-first century is an ideal time to re-think and reflect about school architecture, as we are now building new schools and renovating those built in the 1950s and 1960s to accommodate the baby boom (2004, p. 20). For more than a century, schools have been built on the basis of an industrial paradigm, placing a group of pupils in a standardised space (a classroom) during the academic year, with the aim that they should all acquire the basic skills of the curriculum and then move up a year

until they have reached leaving age. The “industrial” school model perpetuates the idea of learning as a linear and predictable process, in which the teacher has the knowledge and transmits it to the pupils. They, in turn, are evaluated through tests that try to assess whether they have acquired that knowledge. This paradigm still prevails in the education systems in various European countries, with no reform in sight.

Even so, it is claimed that curriculum development requires “the availability of new spaces that encourage different kinds of learning, much as envisaged by Dewey where he called for a variety of equipment, workshops, and laboratories to support learning” (Upitis, 2004, p. 31). Nevertheless, evidence shows that school buildings hardly reflect state-of-the-art pedagogical design and the new paradigms for learning and learning environments. “Although much has been learned over the last ten to fifteen years about learners, learning, and learning environments, these understandings seldom influence the design of school buildings” (Washor, 2003, p. 2). We find an attitude of separation between the educational projects for schools and their corresponding architectural projects or, conversely, a clear difficulty in translating a pedagogical and school organisation project into an architectural design. That has been attempted, for instance, through the “New Learning” model in the Netherlands, inspired by the insights of educational sciences that stress a shift from learning environments based on knowledge transmission to those based on knowledge construction, which considers learning as a social, ‘situated’ and constructive activity. Dutch secondary education reforms, for instance, have been reflected in the “Study House”: the aim is to create new learning environments that stimulate the New Learning. However, teachers still appear to be thinking mostly in terms of learning products – not learning processes –

as a learning goal, and have paid little attention to arranging cooperative learner roles (Kock, Slegers & Voeten, 2005).

The architect has to attend to the users and the usage of the learning spaces, as well as the users' practices (Taylor, 2009). Architecture and education need to be considered from a coordinated perspective that promotes close interaction in the process of designing and implementing the architectural project.

1.3. The school and the city

The debate on school architecture also takes us to the territory of the city. We cannot disregard the fact that the current transformations in education are mostly connected with the changes affecting urban areas: the increasing density of cities, the growing diversity of the population as a result of migration, new lifestyles, etc. The urban environment is closely linked with the role played by the school as an institution in the present day, as well as with the challenges it faces.

The importance of schools in the city ecosystem has been highlighted by Benito (2003), for whom the urban network and its buildings contribute to a culture and a certain semiological effect in which school architecture emerges as a specialised architecture that adopts, within the wider genre of institutional building, ad hoc forms and languages that become part of the heritage and memory of education. "School architecture is itself a programme as well as a class of discourse which, in its materiality, institutes a system of values, the frames in which the appropriation of educational culture and a complete semiology which exhibits different aesthetic, social and ideological symbols are carried out" (Benito, 2003, p. 53). The school "container" forms part of the tools of education and the urban surroundings of this "container" are just as relevant to the explanation of the relationships

between school culture and the urban environment. Therefore, the design of educational spaces is influenced by two types of reasoning: it expresses the predominant orientations regarding institutional architecture, providing a response to similar social and cultural functions manifested in other public buildings; and it reflects the pedagogical discourses relevant to the school culture (Benito, 2003, pp. 54-56).

In the context of urban planning, schools play a decisive role in urban transformation strategies. Politicians and planners face the challenge of deciding “whether to renovate older buildings or commit to new buildings” (Haar, 2002, p. 3).

In the case of the SSMP, the option to renovate old school buildings includes a planning strategy of valuing the heritage of historical buildings and combating the tendency to displace the population from the historical centres to the outskirts of the cities, thereby recovering their former centrality in the urban space. As one of the regional directors of PE states:

We are revitalising all urban buildings in the city centre, which most people tend to abandon, making new ones in the suburbs, so that the desertification of the city doesn't occur. It would be easier for us to create something new in a place far away, without pupils, and then move the pupils there, but no, we are doing rehabilitation work with pupils inside the school. And so this is to say, somehow, that the school does not move out, the school will not even be deprived of its character, and we'll do something else. Therefore, renovating the buildings in the city was the pillar, the centre... For all intents and purposes, the school is the centre of many cities, so, to me, that's one of the main goals, which is in fact not to abandon the cities and to renovate the buildings in the cities, in the city centres. (PE - Regional Director)

It is important to stress that “the school enhances the urban community, not simply as an aesthetic object, but as a site for programmatic development, neighbourhood resource development, and urban restructuring” (Haar, 2002, p. 6).

Associated with the debate about the school in the city, different approaches advocate the importance of small-scale spaces, related to the need to establish social relationships of proximity and the possibility of doing so.

Wetz (2009) proposes a model for learning and for its spaces in secondary schools. Called Urban Village Schools, it is an integrated model that also incorporates a new form of school organisation. His proposals involve the structuring of networks of physically close schools and the sharing of amenities (library, cafeteria, for example). The initiative Human Scale Schools, developed in the United Kingdom (Wallace, 2009), also fits into this aim of setting up smaller-scale schools, which was partly reflected in the British government programme Building Schools for the Future. The conceptual basis is the “human scale education” movement which is underpinned by the relationship between teachers and pupils: small-scale schools and classes; a thematic, interdisciplinary and holistic curriculum; flexible schedules; pedagogy based on questioning and experimentation and supported by information and communication technologies (ICT); assessment that involves dialogue, negotiation and peer review; pupils involvement in school activities; and a partnership with parents and the community (Wallace, 2009, pp. 34-36).

Schools provide facilities that can be crucial for the surrounding community, e.g. libraries, auditoriums or sports facilities, but “to be viable community facilities, schools must be designed and built to tie directly into

the needs and desires of the communities that they serve, both programmatically and physically, in their scale and their symbolic potential to give identity and purpose to the surrounding community" (Haar, 2002, p. 8).

One of the SSMP's aims is to open up the school to the community, encouraging the participation of local organisations in the promotion of cultural and sports activities, or making space available for local associations. This requires architectural intervention to meet the diversity of stakeholders and the objectives that the schools intend to promote.

1.4. The heterogeneity of learning environments

Within learning processes, new realities are taking shape, e.g. the increasing incorporation of ICT, the transformation of libraries into multimedia resource centres, and the introduction of virtual spaces with permanent access to the Internet. Learning is no longer restricted to the classroom but rather should pervade the whole school and extend beyond its doors. Thus, planning and building schools must imply designing the building as a whole, including the outdoor spaces and their relationship with the interior spaces of the schools, the connections between formal and informal spaces, and their organisation. This is the basis of the argument for the transition from classrooms to learning spaces (NLII, 2004).

Thomas (2010) claims that this generates the displacement of learning itself and that we have failed to recognise the primacy of "physical situatedness" in our conceptions of learning itself – unable to articulate where learning takes place in a "world characterised by virtual space and electronic selves". "If we are to articulate the nature of learning in our age, then we need to articulate the nature of the real and virtual spaces and bodies that we inhabit" (Thomas, 2010, p.

502). Learning spaces embody specific definitions of learning and specific learning strategies: "traditional learning spaces, in the form of classrooms and lecture halls, are integrally linked to specific teaching, learning and management strategies which, taken together, embody a specific approach to teaching and learning" (Thomas, 2010, p. 502). Physical learning spaces have a life expectancy that easily exceeds the learning theories that they embody. Thus, they contribute to the inertia associated with the classroom by actively constraining the learning possibilities.

Unlike traditional approaches to learning, current views acknowledge that much, if not most, learning does not occur in formally designated learning spaces but rather in informal spaces, often not originally envisaged as learning spaces. "This realisation lies at the heart of liberating learning from a form of physical imprisonment" (Thomas, 2010, p. 503) and increasing the heterogeneity of learning spaces.

The creation of learning environments demands that we question learning conceptions, with reference to a notion of schools as "learning communities" and classrooms as "learning centres" (Lippman, 2010, pp. 20-22; Nair, Fielding & Lackney, 2009, pp. 200-201). In contrast to spaces of "control", this envisages the design of learning environments that enable the active construction of knowledge. From this perspective, it is not possible to build a space without incorporating its learning model. Hence, learning environments include both the social and physical environments (Lippman, 2010, p. 15).

In a succinct approach to learning theories focused on the active/passive role of the pupil and the environment, Lippman (2010, pp. 127-142) proposes a "practice theory". This aims to analyse "how individuals become acculturated into processes of

doing specific tasks and how they appropriate knowledge for themselves" (Lippman, 2010, pp. 135) by looking at learning in relation to the activities that each individual carries out and the socio-cultural context. The creation of learning communities and centres requires suitable physical contexts based on a set of assumptions (see Lippman, 2010, pp. 137-138) that include concern for the structuring of flexible spaces, in order to provide for their continuous adaptability and an intensive network of social relationships, which enables active learning.

Uptis (2004) also notes that the school of today is a space that serves multiple populations (pupils, parents, adults in training, extra-curricular activities), and the multiplicity of users, of different ages, implies great diversity and complexity. It also requires addressing the growing heterogeneity of the people who occupy the space, as well as taking people with special educational needs into account. Schools should no longer be institutions where only teaching and learning activities take place. The flexibility to adapt school buildings to different activities and different audiences is a central issue in the design of contemporary buildings and their renovation.

The various proposals are reflected in the design of school buildings, both in the types of spaces and their layout and inter-connection, though the debate is far from over. In the different European programmes targeting school buildings, schools are increasingly designed as multifaceted platforms capable of serving multiple modalities of learning, where the settings for informal learning acquire a new centrality.

A relatively hidden dimension of the relationship between school space and learning paradigms is connected with the trends in the political debate on education. Although the need to accommodate scientific and technological innovations into the

educational process is generally recognised, the relationship between learning paradigms and political decision-making is unclear and, in the Portuguese case, generates vigorous debate about its virtue and efficiency. Conservative ideas about learning, heavily based on a “back to basics” approach, resist the proposal of an educational process based on various interrelated learning environments, combining periods of classical teaching and endeavours of collaborative dynamics with group and individual work in different spaces. In the view of the traditionalists, the classroom and the interaction within it are still (almost) the beginning and end of all school activity. Hence, much of the pedagogical work is restricted to the process of listening to the teacher and the subsequent process of assessing the pupils’ performance. Any other learning periods or spaces are disdained.

The SSMP includes the explicit purpose of reconceptualising the predominant teaching practices in Portuguese secondary schools, which are mainly oriented towards training pupils to pass university entrance exams. It also includes the concept of the library as a multimedia resource centre “placed” as the symbolic “heart” of the school, as well as the concept of the learning street as an informal learning core-pathway suitable for many purposes. Nair (2005) questions whether this new element of today’s school truly represents a different way to learn. According to the author, to accommodate the multiple modalities of learning that today’s schools should nurture we need to start replacing some of the traditional single-purpose spaces with those that can serve multiple uses, as in the case of the learning street, and thus help to create an effective learning environment conducive to the demands of a 21st-century education (Nair, 2005).

As a result of theoretical and empirical developments, it was hypothesised that the architecture of learning environments and their heterogeneity can have an impact on learning processes. To proceed along this analytical path, we focused our attention on the study of the three main principles of the SSMP: the library as the heart of the school; the creation of a learning street; and the opening-up of the school to the community.

2. Methodology

In a programme like the SSMP (which, besides being a public policy measure for infrastructure renewal, implicitly aims to induce a process of educational change in schools), a whole set of stakeholders related to the different stages of the procedures can be identified. The presence of distinct sets of values, attitudes and purposes requires reflection regarding these processes. It also demands penetrating the process of collecting and analysing information about the building process, the assessment of needs, and the objectives of the different stakeholders.

With this purpose, the methodology of the study was based on a triangulation approach, using both qualitative and quantitative methods. The research started with a content analysis of the documents on the school buildings renovation programme and of the educational policy framework, combined with interviews with the actors responsible for the policy measure. In the second stage, we selected and analysed 13 schools out of the 30 concluded in the first phase of the rebuilding programme. The schools were selected on the basis of the following criteria: educational range and specificities (e.g. artistic education, alternative curricula); local context (urban or semi-urban); size; architectural typologies of the original building; type of project proposed by the architect; architects' practice responsible for the

project; and social context. The third step was to interview the chief architects in order to understand the main objectives of their proposals and views about the process and, also, how the discussion with the other social actors and stakeholders was considered. These interviews included a tour on each school, led by the architect. The next step was a survey of the school community: interviews with the school principals and school council¹ presidents; and two questionnaires distributed among a sample of teachers and pupils. Another methodological strategy was the organisation of dynamic focus groups among teachers and pupils. These included a “walk through” the learning environments with the different school community members, at which time the new school spaces and their social and educational implications were discussed. The documents and interviews were examined by means of content analysis and the quantitative data from the questionnaires was subject to descriptive and multivariate analysis. As regards the research question discussed in this chapter, it was supported by a documentary analysis of the SSMP and content categorical analysis of a set of interviews.

In order to present empirical evidence of the main features of the relationship between education models and school buildings in urban spaces, the study aimed at comparing schools in urban areas with schools in semi-urban ones. For the current chapter, two case studies were considered: one situated in a semi-urban area, with a pupils intake from a wide regional area, including rural settings; the other located in a major urban area and marked by its high ethnic diversity. This resulted in a comparison of perspectives at two levels: those of the schools and the social actors

¹ A new collective body created in 2008 in Portuguese state schools; it has broad powers and includes the participation of local stakeholders.

(according to their different roles: architects, school boards, teachers and pupils).

3. Portuguese education policy and the Secondary School Modernisation Programme

As in other European countries, the education system in Portugal has undergone various changes in recent years. The mass expansion of schools after the 1970s raised the issue of how to address the discrepancies in the school community. Equal educational opportunities became a central issue in education and it was crucial to provide a supply of education that allowed the integration of all pupils, regardless of their aspirations or backgrounds. This was particularly important in secondary education, where structural measures were adopted, particularly in the period 2005-2009, following extensive legislation promoted by the Ministry of Education. Some of the most significant measures were:

- the extension of compulsory education until 18 years of age or the completion of 12 years of schooling for all pupils;
- the updating of curricula and the diversification of educational alternatives in secondary schools to conform to the new social and economic situation;
- heavy investment in adult education and training;
- the general availability of vocational education in state schools;
- the increasing introduction of ICT through the "Technological Plan for Education";
- the introduction of a status of autonomy for schools, to inject new leadership and a more decentralised management of education policies;
- the participation of local stakeholders in school decisions through the school council.

The aim of greater curricular diversity is to prepare secondary schools for the increased numbers and heterogeneity of pupils that will necessarily result from the extension of compulsory education. Alongside the regular courses oriented towards the continuation of a pupil's studies, state schools are now offering a diversity of educational and training options, such as vocational and artistic education. In addition, there has been considerable investment in adult education and training, with the objective of raising their qualifications through the certification of skills and lifelong learning programmes.

The extension of compulsory schooling, the reforms in the educational system and the recent policies of equal access to education in secondary schools are meant to bring new audiences to schools, which requires suitable spaces that can cope with the new dynamics and diversity of state schools. Most schools were rundown and unable to meet current educational needs effectively. Against this background the SSMP was launched in January 2007, to meet these new strategic features and, in order to deliver it, the Portuguese government set up PE, the state-owned company mentioned above, which is responsible for developing, managing and implementing the renovation programme and maintaining state schools in the future.

The SSMP has three main objectives (Council of Ministers, 2007): (1) to rehabilitate and modernise secondary school buildings, restoring their physical and functional efficiency and creating the proper conditions for an education adapted to the new course content, teaching methods and ICT; (2) to open up schools to the community, creating the right conditions for closer cooperative links with the neighbourhood and ensuring that the school infrastructures is fully exploited; (3) to establish a new

management model for school premises, ensuring the optimisation of resources and the correct management of the conservation and maintenance of buildings after the intervention.

Implementation of the programme begins when the state-owned company PE selects the schools, with the process being guided by a rationale of co-operation with the school and local community. The final result should reflect the PE guidelines for the architectural and educational project, which, even so, allow a significant range of aesthetic and technical options and the adoption of stakeholders' suggestions. This management process is considered of strategic importance for the fulfilment of the curricula and an effective response to the expectations and priorities of users. The school board draws up a Strategic Plan in which the objectives established in the school's educational project are presented and the corresponding spatial needs are identified. On the basis of the interaction between the school board and the design team, the specific programme of intervention is established. However, the users' participation in the projects varies, as do the conflict arising in the process and the appropriation of the resulting school spaces.

To guide the architects' design work, an architectural design manual was produced, defining a set of guidelines and requirements that constitute the architecture programme. It is the result of international benchmarking and the incorporation of suggestions from consultants in different fields of expertise, e.g. those working in science laboratories and libraries. It is also noteworthy that the SSMP is part of an international movement that examines the role of architecture in learning and is particularly influenced by the British programme Building Schools for the Future.

The “programme” states that it aims to develop a new school building model that does not produce a standard building but rather a type of school associated with a pedagogical project, one that seeks to conform to the needs, objectives and characteristics of the local communities, provides the right comfort levels for the school community, and can be adapted to developments in educational models and pedagogical practices (Parque Escolar, 2009). As mentioned above, the three central concepts of the educational paradigm embraced by the programme are:

- The library as the heart of the school, acquiring physical and symbolic centrality;
- The importance of informal learning and the decentralisation of teaching and learning from the classroom, reflected in the creation of a learning street;
- The opening-up of the school to the community, including spaces that can be used for different kind of activities (e.g. auditoria, social spaces, sports facilities or classrooms).²

This chapter examines the perspectives of the different social actors regarding these three principles in order to highlight how far school architecture can have an impact on learning processes and how such impacts can be enhanced when stakeholders share common

² Other spatial and functional parameters are mentioned, e.g.: promotion of an inclusive school, to create learning opportunities for all; adaptation to contemporary and developing curricula, with emphasis on the diversification of pedagogical practices, which requires diverse and flexible spaces; the strengthening of experimental practices through heavy investment in laboratories and workshops; the intensive use of ICT; the creation of suitable working conditions for enhancing educational performance, in conformity with the new environmental paradigms; the widespread promotion of a learning culture in schools and in society at large, to enhance their strategic centrality in the area.

values and purposes. We will precede the analysis by a discussion of the relationship between the architectural and educational projects in order to contextualise the analysis of the policy, as expressed in the programme, and its outcomes, as expressed in the positions of the main stakeholders: architects, school boards, teachers and pupils. To close the analysis, we will look for some of the impacts of school renovation on learning.

4. Empirical evidence

It was a challenge for the research team to understand to what extent the assumptions of the learning programme are reflected in the architectural projects and in the learning practices implemented in schools. It was of critical importance to assess the role played by the different social actors, especially the level of participation of each one in the process of school renovation, in which discussion is part of the civic process (Jones, 2006). The importance of stakeholders participation also allows the discussion of the consequences that a political decision may have at the meso- and micro-levels in education. As Maguire, Ball and Braun (2010, p. 157) state regarding the enactment of policies, "the form and extent of enactment will also depend to some extent on whether a policy is mandated, strongly recommended or suggested (...) as well as the degree to which particular policies will 'fit' with the ethos and culture of the school". On this issue, Spillane et al. (2002) mention the importance – for the different policy actors, in particular school principals – of making sense.

As mentioned earlier, the schools involved are mainly integrated into urban areas, though these vary significantly. The different urban environments have implications for the performance of the programme

and its appropriation in each school. Two contrasting schools have therefore been selected as case studies:

School A – a school located in a semi-urban area with a tradition of vocational education; located in northern Portugal, its intake comes from the large, bordering rural areas. It was built in the 1950s, along the lines of “industrial and commercial schools”.

School B – a more recent school, oriented towards both regular and vocational education; it is located on the outskirts of Lisbon, in an urban area with a multi-ethnic population. It was built in the 1980s, in the period of mass educational expansion, according to a standardised typology of ‘pavilion blocks’.

Within the context of these two schools, the educational principles present in the policy (reflected in the “programme”) are compared with those of the different stakeholders (architects, school principals, council presidents, teachers and pupils), in order to evaluate to what extent these principles are shared or conflicting. Each of these social actors will be marked as A or B, i.e. corresponding to school A or B. For most issues, the perspectives of all actors are brought together, but for others only the social actors concerned express themselves. In the case of the school boards, sometimes it is the principal (P) who speaks, other times it is the school council president (C). Sometimes, as different people were present, the excerpts from the focus groups do not appear in direct speech but in a sentence condensing the various opinions (*italicised*).

4.1. The programme, the educational project and the architectural project

One of the programme’s emphases is that each architectural project should reflect the respective school’s educational project, instead of being a

standardised solution, as in the past. Indeed, the architects express the possibility of different forms of appropriating the programme, with consequences on the different projects that have been carried out. Nevertheless, concerning the implication of the school's educational project in the architecture project, the different social actors' perspectives vary (Table 1).

Table 1. The educational project and the architectural project

The Programme (SSMP)	Architect A
<p>The information contained in this manual was planned to be adapted to the specific situation of each school, in order to converge in the direction of the respective educational project.</p>	<p>There is a process of assessing the existing school and having contact with the school, which is always mediated by <i>Parque Escolar</i>, through which the school also sees the designs we produce and speaks out. This way, everything starts to fit together. But it is this dialogue that often fails... usually it is not limited to the project; during the works it restarts and there are adjustments and changes.</p>
<p>The model of school building adopted is not a school-type, but a type of school that converges toward the educational project proposed by each school, allowing an appropriate response to the needs, objectives and characteristics of school communities and ensuring the durability and sustainability of the intervention in an extended timeframe</p>	<hr/> <p>School Board A</p> <p>P: I do not see much connection between the educational projects and school facilities. There are a number of facilities that must exist within a school and afterwards the activities that are carried out there are what embodies the educational project. I can say at this point that the facilities we have now don't limit us in any activity; on the contrary, they are an expansion. So the development of the school with the sports pavilion, and the capacity of the auditorium, allowed an increase, in quality and quantity, of the type of action carried out in school, particularly in terms of a large mass of people, a large number of students.</p> <p>C: (...) Without wanting to criticise anyone, because the architects were hired and certainly did the best they could or knew how to, for sure, but I think they were far from aware of what a secondary school is.</p> <hr/>

Architect B

(...) [The design] is the very programme that the school wants. There are schools that are more inclined to vocational education ... there are others that are more focused on... I mean, each school is a specific case.

School Board B

C: I think it [the design project] didn't take into account the educational project, I don't think it did, although school educational projects are so open, so broad with the goals we have there, the objectives are so broad and general, that it turns out to fit almost everything there.

While the programme states that the design project should always respond to the school's educational project, and both architects claim that that actually happens, architect A hints at the difficulties in the discussion process with the schools, and the school boards are not consensual on that issue. Both school boards A and B assume that the design project does not embody the educational project but facilitates it, for different reasons. The principal of School A claims that a school's needs in terms of school facilities are general but the conditions of these facilities can enhance the educational project. The school council president agrees, but concludes that the design team was not aware of the way a school functions. On the other hand, school council president B considers that the educational projects are so broad that, ultimately, almost anything fits.

The difficulties in addressing school users and usage are of critical importance and cannot be neglected. One can stress, from the interviews and documentary analysis, that school A, located in a semi-urban area, developed a closer connection with the architectural programme and the educational project. The discussions with the architect's team were more

precise and frequent, in particular because it is a school with a strong vocational education, namely for technical occupations (such as those of an electrician or mechanic) and sports, which demands certain specificities in the configuration of the space. On the other hand, school boards play a mediating role in the opening-up (or not) of the discussion to the school community.

Let us now focus on the programme's principles.

4.2. The learning street

The concept of the learning street, which embodies the idea of promoting informal learning and decentralising educational processes from the classroom, is appropriated differently by the various social actors (Table 2).

Table 2. The learning street and informal spaces

Programme (SSMP)	Architect A
It is intended that the school space as a whole is established as a diffuser element of a learning environment. To this end, it is proposed that the various functional areas of the school are articulated through a route - learning street - that constitutes a succession of spaces (interior and exterior) with diverse usages, related to different learning situations (formal and/or informal), including: (1) areas for displaying work/didactic contents in a permanent and/or temporary way; (2) areas for displaying museum collections ('memory and knowledge space'); (3) areas to support extra-curricular activities (clubs); and (4) areas for the informal study of the educational community. This route must be easily readable and recognisable, and the spaces	There isn't a proper learning street here; there are some corridors that flow... In this other school that I am designing now, the learning street is a very important thing, it's a huge space with a great height. (...) It's a good idea to have areas beyond the actual space of the classroom, which pupils can appropriate, for leisure or just to be there, writing on their laptops. In that other school we have created plenty of informal areas...
	School Board A
	P: I've discussed this before: for there to be independent learning, pupils need to be motivated and it seems to me that everyone forgets that the pupils are the main cause, reason and objective. If we have great difficulty in motivating them to succeed, only a few seek development by themselves. The school can create this learning street but only a few pupils take advantage of it.

associated with it should have good conditions for visual accessibility, enhancing the conditions for natural surveillance.

Teachers A (Focus group)

It is a good space.

Pupils A (Focus group)

None of the pupils could identify the learning street.

The pupils' room works well in this school.

Architect B

When I was told about the purpose of the learning street, as a unifying space, which I think is great. I did some research on the net. I came up with some schools that also applied it, especially the English experience. So I did this research and the learning street is a very similar space to what we find here. (...) I believe it was in Scotland where the concept originated... (...) But that was where the concept emerged and evolved, and today schools use that space for gathering and exchanging ideas, calling it the learning street. (...) I think it seems a good idea, especially here in this school it was great. All the teachers supported the idea and, as you've seen, it's a dynamic space with the assemblage of ideas... and as I realise it, there are no longer groups in the corners...

School Board B

P: The rooms for the clubs are facing the "Ágora", which is the central space for gatherings, that space between the blocks. This was our request.

C: That space has become beautiful; we call it the "Ágora". It brings together all the buildings, it's excellent...

Teachers B (Focus group)

The "Ágora" may not be perfect, but I like it; it's better than it was before. Quite honestly, when it comes to the learning street, I do not quite understand this concept, what they meant... I, too, don't know what it is.

Pupils B (Focus group)

None of the pupils could identify the learning street. After the explanation, they were unanimous in saying that it does not apply to that school.

Still, the "Ágora" is one of the spaces mentioned most as a gathering place and as the greatest accomplishment of the work.

Both architects have appropriated the concept of the learning street according to what is defined by the programme, though, in the case of school A, the architect did not implement it. This shows that the SSMP, despite including a set of learning assumptions, does not impose a uniform model for the architects. It also reflects the difficulties in integrating certain concepts when renovating older buildings rather than building new ones. On the other hand, architect B notes how the concept originated elsewhere and has evolved and how he actually implemented it according to the idea of establishing a diffuser element of learning. In fact, school B has become a benchmark for its learning street, which is called the "Ágora" and is very important for the coexistence of pupils from very different ethnic backgrounds. In the two schools the positions diverge. Principal A devalues the learning street as he considers the conditions are not yet met for it to succeed, particularly in terms of the pupils' motivation for active and autonomous learning. According to him, the space will not stimulate learning if the pre-conditions are not guaranteed, which is particularly important in more disadvantaged contexts. Regarding the teachers and pupils at this school, they were unaware of the notion of the learning street, associating it with the pupils' common area, which both consider works well – and which the pupils emphasise as the most important space in the school. In school B, where the learning street is actually more recognisable (the "Ágora"), the school board shares

the concept and is pleased with its impact on the school's social dynamics. However, that is not the case of the teachers and pupils, who hardly recognise it. This reveals a conception that is present at the design and decision-taking levels – architects, principals and school council presidents are aware of it and have discussed it – though it is not so present for teachers and pupils who have not appropriated the concept. In line with the results of the "New Learning" study (Kock, Slegers & Voeten, 2005), this indicates that teachers and pupils need more support to transform education into the envisaged learning, as knowledge construction.

4.3. The library as the centre of the school

The second prominent spatial parameter, in accordance with the decentralisation of educational processes from the classroom, is the physical and symbolic centrality of the library/resources centre as "the heart of the school". This reveals itself as a more widely shared concept among the various social actors (Table 3).

Table 3. The library as "the heart of the school"

Programme (SSMP)	Architect A
It is important to consider the area called the library as the "heart" of the school: a space that is physically and visually accessible to the school community from the entrance. The message conveyed by the condition of symbolic centrality is that of an area for learning and work, marked by the presence of "books", one that is open and comfortable, where all are welcome. Its visibility here helps to encourage its use by the community and to spread the practice of learning.	It is a space that, from the beginning, PE said should be highly visible; it would be accessible from the entry and located not far from the school circuits. So we always attempt to put it in central areas, not isolated. With regard to glazing the library, so that when walking through the school you realise that the library exists, it is an important aspect... (...) I think it's also related to opening it up to the school community, so that pupils realise that there is an important space, which is one of the most important school spaces and is collective.
	School Board A
	P: It's a very popular library but I wouldn't call it the heart of the school,

because we have 1500 pupils. The library does not hold more than 50 to 100 pupils. But, I mean, for those pupils who want to come to school, if they have a break and want to use it to study or do research, the library is ready to respond.

Teachers A (Focus group)

The library was already central before; the school already acted around the library because the library was quite new, it was beautiful, it was graceful (...) I had night classes and the library was always full. Previously, not being as central as it is today, it was located, for example, near the staff room, near the classrooms. So it ended up being a meeting point for teachers and pupils. Because all the teachers had to pass there, as the staffroom was on the other side. Often, when we think of centrality, we have a geometric notion. And centrality in an organisation doesn't have to be geometric. Actually the library is the nicest place in the school.

Pupils A (Focus group)

It's not visible, but it's in a special place. Because no one sees the library, passing normally through the school (...) The pupils go from the meeting room to the classroom and the library is not on their way.

Architect B

In former libraries, the books were locked in glass cabinets, which was the same as saying "do not touch". It was a bit like the concept of librarians who see readers as the enemy that will touch their books, so it was difficult, there wasn't a big interchange in that. Now it's different. In the new libraries, the books are all in sight, everything is accessible and, in addition, they have daily newspapers and magazines, so they have everything to encourage reading...

School Board B

P: [*One of the central school spaces is*] the library.

C: I think the library is beautiful, in terms of colour and cheerfulness. The project is more appealing, it creates another dynamic, but we have always developed the library, through computers for searches and registering... Now our work is made easier.

Teachers B (Focus group)

Teachers appreciate the library and find that the library is the pupils' favourite place.

If they could, they would make the library their meeting room.

Pupils B (Focus group)

The library is highlighted positively for having a room to watch movies and a space to study.

Even without lessons they are always there studying. Before, there were scheduling conflicts in the library because there wasn't enough space for all the pupils.

It's well situated.

Despite a consensual recognition of the library's importance in school life, it is noteworthy how the different actors from school A question the idea of centrality. From the principal's point of view, it is an issue of dimension: the library cannot be the heart of the school when it cannot accommodate the large number of pupils. From the teachers and pupils' point of view, the centrality is not of a "geometric" kind, but rather relates to its position on the users' regular circuits. Also, from the conception and design point of view, there is still a notion that a library is closely associated with "books" and "reading", while the school boards and pupils have a broader notion of the library's space as a multiple-resource centre, involving activities such as "research", "computers" and "watching movies".

4.4. Opening the school to the community

The different social actors are fairly consensual on the importance of opening up the school to the outside community, putting stress on the new physical conditions that facilitate such action (Table 4).

Table 4. Opening up the school to the community

Programme (SSMP) Opening up the school to the outside community in order to promote skill certification and life-long learning.	Architect A Opening up to the community, with the possibility of the community actually being able to use the school, is an aspect which is very important for PE, if we do not see the school as a closed space where parents just go to wait for their children in the evening (...) The school can be used for events, for use of the library...
	School Board A P: We were already an open school. (...) I personally hate having to beg and "kiss someone's hands" – that set of influences to achieve something for the school. Since I have been here, and I have been for many years, we've always tried to invest in sources of income to give us a good return to reinvest. So we started by renting out the mechanics workshop rooms to the Employment Centre. With this income, we started by building the swimming-pool; with the income from the swimming-pool we built the synthetic lawn; we built new auditoriums, new staff rooms, all of these still in the old school. And, at the present moment, this posture is being maintained. (...) With this income we implement school projects without having to beg from anyone. This already existed in the old school and remains in place in this school.
	Teachers A (Focus group) This school already had that tradition. This project could have benefited more [in relation to opening up the school to the community].
	Pupils A (Focus group) <i>The pupils give examples of different partnerships and of groups that use the school.</i>
	Architect B I think it's important, but I don't know if, afterwards, the schools actually open up, but at

least the school is ready for it. Then it depends on the management, in conjunction with PE. (...) The community may not have this habit, but why wouldn't they go to the school at the weekend, go to the school library? Or a theatre group – as there is no theatre nearby, they can come here. Even companies can rent the school to do training. And it turns out to be an additional source of income for the school to launch projects or anything else...

School Board B

P: It is important, at least in financial terms, isn't it? Because somehow it pays off some of the funds that were invested here, this matter regarding PE. For us, I think it brings the school community closer. Often, there is a certain image of the school, or even fear, and this is demystified in the light of such a situation. And we've had many experiences of parents who don't come to school because this opening-up to the community doesn't happen to the degree that we think it might. And there isn't the habit of "I can hire an auditorium, so I'll rent it and so on", or "I can rent the library or any other space". It's not a practice.

Teachers B (Focus group)

I think we should open up the school to the community; however that existed before the renovation.

Opening up the school to the community, in the sense of providing services, is tricky when you bar entry to people in school and people must identify themselves and the pupils can't go out. And the school is made to be closed and the children delivered to our care here. This is contradictory.

This also requires many more employees in the school, which there are not.

I think the concept is good and it could even be an asset, that I agree, but this requires a complete restructuring of the operation of the school.

Pupils B (Focus group)

The pupils agree with the concept.

We can see that, for example on Tuesday afternoon, we see people, our friends' parents, coming here for training.

In theory, the presupposition of opening up schools to the community is that local actors will participate in cultural, sports and training activities there. In practice, this is a principle whose applicability largely depends on the area. It is clear that school A, in a semi-urban setting, is more effectively open to the community than school B, in a suburban setting. In smaller environments, school facilities are central to the surrounding community, while in larger environments there tends to be a certain distance between the school and the community, as principal B notes. Furthermore, some teachers assume that opening the school to the community requires dealing with the issue of security and the need for additional human resources, which have not been addressed.

4.5. Learning and spatial renovation

Finally, regarding, in a broader sense, the impacts of school renovation on learning, the different actors relate it to the creation of better conditions for teaching and learning, but not as the source of a direct effect (Table 5).

Table 5. The impacts of school renovation on learning

Programme (SSMP)	Architect A
(...) attractive places, capable of providing well-being and ensuring the essential conditions for good pedagogical practice that coincides with the educational values promoted by the curricula, thus encouraging and promoting the teaching activities, performance and well-being of the educational community.	To begin with, I think that a building that has deteriorated always invites degradation... It's like a broken car, one more scratch, one more dent doesn't matter. So I think that the degradation of the spaces, sometimes it's the degradation of the building, sometimes it's the degradation of the furniture, sometimes it's everything... Obviously, the degradation also has to do with that, though we know that it's not just a problem of the buildings. It's a social problem. (...) So, I think architecture doesn't solve social problems, but it interferes... Now I'm talking about something I don't know anything about, but I think it will necessarily have consequences for the conditions of the people and pupils in school, and I think that's important, of course it is.

School Board A

P: The connection is not that linear, no, because motivation is something that comes from within... that comes from the upbringing they have at home, from previous experiences. There is some... some positive feedback from pupils because they are comfortable in school, but this relationship with commitment and performance is not direct. (...) The building makes it more comfortable, encourages them more to study, to spend more time in the library, but often they are in the library but are more on the internet etc. than actually studying.

Teachers A (Focus group)

There is no direct impact of technology on the teaching-learning relationship and the achievement of academic results. (...) It doesn't exist without what the teacher produces (...) It seems to me, they are saying we are completely disposable when they state that the computer is a miracle for the classroom... it's a lie! It may help if you know how to use it.

I have a different answer. It allows you to do some things you could not do before (...) but it also brings problems.

That's obvious because we are dependent on the machine.

We can use the same methodology but with other technologies.

Pupils A (Focus group)

Pupils feel that there is no direct relationship between the improved space and equipment and their performance. However, those who attend the vocational course consider: in our case, there is because the machines that we showed you didn't exist last year. And that really facilitates our performance and those machines are quite widely used in companies.

Architect B

We were informed that the pupils were calmer, really calmer, and more motivated. I don't know if that was reflected later in terms of achievement, but I'm convinced it was.

School Board B

P: It's a bit too early; I can't answer because these processes are very slow. It's one factor in a universe of factors, though we feel that what

carries most weight is the family structure ...
[But the pupils] say they like the school.

C: Obviously, by improving the conditions for pupils at school, hypothetically we improve the educational and learning conditions... (...) The new school has better equipment and offers new content via PowerPoint, video clips, anything to try to catch their attention and increase their motivation, but there is always very little feedback from them...

Teachers B (Focus group)

We are only looking at one factor and there are various factors that intervene (...) It's hard to evaluate the effect of only one factor.

The results in education are multifactorial...

There is another factor that destabilises the situation completely, that is, the instability that we have had for two years. And every year, every day, things change in education. (...) For me, the instability doesn't allow a proper evaluation of the impact this could have.

Pupils B (Focus group)

Pupils do not consider that they are more motivated to study but agree that the classes are more interactive and dynamic.

The teachers who provide more PowerPoint presentations are given more attention.

They do not agree that there has been a positive impact on achievement.

Architect A's arguments point towards the idea in "broken windows theory", whereby, in a deteriorated environment, people tend to act in a disorderly manner and promote more vandalism, and vice versa. Architect B also gives evidence of that, noting that the pupils are calmer in the new environment. They both believe that architecture influences behaviour and, consequently, educational achievement. The principals and teachers from both schools stress that there are several others factors involved in this evaluation, which also require more time to be evaluated. A certain resistance to ICT is present in the teachers' discourses in school A: they note that even with new technologies teachers can continue to use the same old methodologies. The pupils also agree that there is

no direct relationship between the improvements in terms of space and equipment and their performance, even though they are in favour of more interactive and dynamic methodologies.

Discussion

The SSMP is an important measure in the current Portuguese education system. As one of the key government programmes, its evaluation can produce significant and valuable outcomes.

Urban areas present important challenges to schools as institutions. As has been stressed, the two case studies presented show differences with regard to the characteristics of the pupils and the process of “negotiation” between PE, the architect, and the school board. At school A, in a semi-urban area, the process was discussed much more with the school board. But at school B, the importance given to the learning street reveals a concern with ethnic heterogeneity and the importance of a shared space, and aims at diminishing stigma attitudes. With the diversification of learning sources, spaces, actors and institutions, real and virtual, mainly in urban areas, schools are confronted with the challenge of finding new and renovated ways of incorporating learning activities that are much broader than the formal teacher-pupil relationship in the classroom.

The analysis presented in this chapter allows four main general issues to be raised.

Firstly, the importance of the educational reform (currently suspended due to changes in the government) and the role of building renovation in the main changes taking place in the education system. The different social actors recognise the existence of a relationship between knowledge, education and space, though not a direct one. Hence, it is vital to discuss

the importance of this political programme to promote educational achievement, with the complex relationship between policy and outcomes always being borne in mind.

Secondly, with the SSMP, architects become active players in the process and space can have other impacts on learning. However, the consequences have yet to be evaluated, particularly with regard to the uses of the various spaces and their appropriation within the schools and the impacts on learning models and pedagogical practices. We would like to highlight the changes taking place in the role of the library – from a traditional reading place to a work space – and the heterogeneity of learning spaces, that is, the dissemination of learning activities far beyond the closed classroom and a closer relationship with other social actors and institutions outside school. This implies a change in the role and conception of the school as an institution. The learning street could be taken more as a presupposition of the learning activities taking place in the various (formal and informal) spaces in schools.

Thirdly, the programme includes certain principles on the renovation of school spaces that reflect assumptions about learning, though it does not impose a uniform model for the architects, as the interviews and implemented projects revealed. The analysis shows that the architects mention different forms of appropriation of the programme, with consequences on the projects that they have developed. This was clear in the two schools presented. Furthermore, the programme's learning assumptions are not always in line with the learning models adopted by the schools: this means that, for the envisaged transformations to occur, it is necessary to act at other levels, particularly those of awareness and support among the teachers and pupils. As some of the social actors have said,

nothing has changed, that is, the desired transformations are far from dependent on the space. They depend on institutional and individual actions and desires.

Fourthly, the social actors directly involved in this programme have developed patterns of social relationships, through different communication and participation mechanisms, which demand further reflection. The programme's impact is perceived more positively when stakeholders share common values and purposes, while problems arise when this is not the case.

The architects had the opportunity to develop specialised professional knowledge: school architecture. This development requires more extensive dialogue with the social actors from the schools, for example, the principals and teachers. The importance given by architects to specialised knowledge varies, and this is reflected in their proposals.

The school boards are the main institutional actor representing the school users in the process and the opening-up of the dialogue process to the school community depends on them.

Teachers and pupils stand at a great distance from the process, though the social actors who daily occupy the different spaces and model them to their activities.

The aim of the state-owned company PE was to design a programme combining architecture and education, though the main difficulty was how to conceive a model that promoted dialogue between all the actors present in the SSMP. As we can conclude from the interviews, there was little dialogue. PE ended up assuming a leading role, as well as that of a mediator, which has its advantages and disadvantages: on the

one hand, it can be crucial to have a degree of centralisation in the decision-making and an institutional level of communication; on the other hand, this political measure, which is quite expensive and decisive for the future (due to the relatively desirable stability of the renovated buildings) has to consider the schools' concomitant educational projects and the actors' needs.

The dialogue between the social actors, including the stakeholders, is crucial and requires a platform of understanding, to discuss each actor and institution's role.

School renovation can play an important role in the configuration of these new features and demands that architects, school boards, teachers and pupils play an active role in the discussion of what school spaces should be like and what their educational functions and aims are.

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CHAPTER 4

ACROSS AND WITHIN-SCHOOL VARIATION IN NEW ZEALAND SECONDARY SCHOOLS

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Abstract

This paper outlines the methodology and results of an investigation into the variation of academic student outcomes for 15 year olds in the subjects of English, mathematics and science in New Zealand secondary schools. This is the first stage in a larger study that investigates the impact of middle leadership practices on student academic outcomes in large urban schools. The research design and results established through a quantitative data analysis reveal that there is considerable variation in student achievement between academic departments across and within schools. This data has been collected over a three year period and has informed work that is focused on the leadership practices of department leaders that impacts on student achievement. Comparing English, mathematics and science departments across and within-schools has established a clear set of data to show within-school variability that will inform further work in the field.

Keywords

Middle leadership – With-in school variation – Student achievement

1. Introduction

There is evidence that within-school variance in secondary schools is a continuing cause for concern and that overall school results can mask under performance in some areas. Some researchers argue that academic outcome measures are best considered at department level (Smith and Tomlinson 1989; Fitz-Gibbon 1991) where educationally specific decisions are made and a greater proportion of variation is explained rather than at school level. The concept of school effectiveness depends on the choice of measures of students' educational outcomes. Sammons, Mortimore and Thomas (1997) assert that while academic outcomes are not the only ones that should be valued, they are of critical importance in OECD (Organisation for Economic Cooperation and Development) countries where "high stakes" testing is institutionalised via a public examination system. They also believe that any comparison of results of individual schools should be comparing "like with like", taking into account student intake because it is the value added improvement and the schools' ability to promote progress while students are in the school that needs to be measured, not what inherent advantages they had before they attended the school. Sammons and Luyten (2009) argue that the focus on high stakes testing and exam results that are used to measure and compare performance of whole schools in an accountability culture needs to be more focussed on differential effectiveness within a school. Consideration of the internal variation in results for subgroups of students, particularly by department, gives a more accurate measure of the subjects or curriculum areas where students are achieving.

In a study of the relative effectiveness of Post-16 Institutions in England (including schools offering assisted places to underprivileged students) Tymms (1992) found considerable variation between schools

in their performance in individual subjects but less variation for whole-school measures. Some differences were found for student outcomes in relation to the type of institution pupils had attended, but the effects were generally quite small and varied across outcome and curriculum measures. Tymms explored differences between schools by comparing the performance of similar students in different types of institutions but found the within-school variation more significant. Both Tymms and Fitz-Gibbon (1990) found that the order of influence on student achievement was determined most strongly by the individual pupil, then by the department responsible for a particular performance, then by the school as a whole and finally by the type of school.

Based on quantitative analysis of Key Stage 3 exams in England, Reynolds (2004, 2007) argues that in secondary schools where progress is in line with expectations, there is clear evidence of within-school variation. He states that if the results of six groups of boys and girls in English, Maths and Science are analysed, that 80% of schools show 'value added' significantly higher or lower than expected academic outcomes in at least one group. Over a three year period, 50% of schools have at least one subject in which progress would put them in the top 20% nationally of the subject concerned. Reynolds contends that the causal factors for variation in performance include variation in teacher competence, unreliable implementation of national strategies and the maximized impact of improvement strategies that widen the student achievement gap.

The within-school variance of student academic outcomes in New Zealand and other OECD countries is best represented in the scales developed using the PISA 2003 results, where New Zealand, Sweden, Norway and Iceland all showed considerably higher

within-school variance for 15 year old Mathematics students results than across school variance (OECD, 2003). A very small proportion of this variance is explained by the index of economic, social and cultural status of students and schools. In comparison to the OECD averages, the amount of variance that is attributable to between school differences in New Zealand is small.¹ This pattern reinforces the point that poor student achievement is not confined to a subset of New Zealand schools, such as those in poorer areas, so disparities in student achievement are a challenge for all New Zealand schools (Wylie & Robinson, 2009). The evidence over the last fifteen years from studies in England and Wales that examine within-school variance and secondary school department effectiveness would suggest an analysis of similar data in New Zealand will contribute to the international work in this area, particularly as New Zealand has one of the biggest within-school variance 'problems' within the OECD (Wylie and Robinson, 2009).

1.1. The department as unit of analysis in secondary schools

In many Western countries, the organisation of high schools into the 'realms of knowledge' of subject departments is now almost a universal feature of secondary schools despite the widely varying location, size, vision and governance style found among schools (Siskin, 1994). There is a need to examine student achievement data at class and department level because the evidence is that individual schools are not uniformly effective. Subject departments also provide a unit of analysis for within-school variation that can be measured for consistency over time.

¹ Learning from Tomorrow's World: First Results from PISA 2003, p.162

A number of British researchers have analysed large data sets using state examination results to measure academic outcomes for students. These measures allow differentiation between subjects within schools, therefore allowing department performance to be compared. Studies of an extensive data set of student achievement called the A level Information System (ALIS) (Smith & Tomlinson, 1989; Fitz-Gibbon, 1991) show that more variance existed at the department level than at the school level and the proportion of variance at the class level was more than for the department level, even though in many schools the class was the department. In the late 80s and early 90s, Fitz-Gibbon (1992) found that schools with A level grades in the English department were not necessarily achieving the same grades in the Mathematics department, or vice versa. Her analysis of O and A level student achievement data of 1157 pupils located in one local education authority covering the north of England from 1983-86 found that with mean O level grade as a covariate, the effect of subject (English or Maths) was highly significant. The interaction of subject within a school was also highly significant, indicating that different schools obtained good results in different subjects. Fitz-Gibbon asserted that the results indicated that parents or researchers should not be looking for the best school in which to educate their children - but the best department. She suggested that reform efforts should also focus on efforts to improve education within schools, department by department, rather than a focus on schools in competition with each other.

In a large study of differential effectiveness of secondary schools in London, Sammons, Thomas and Mortimore (1997) found that 32% of the schools recorded significant negative effects in some subjects and significant positive effects in others, taking account of prior attainment and background. These

schools had mixed effects at GCSE and marked within-school variation, but these results were masked by a reliance on a single whole school measure of a total GCSE score. When the researchers looked at schools' effects on total GCSE performance over three years from 1990-92 the whole school performance score was more stable than those for specific subjects. Using the department as the unit for analysis to identify differential effects within a school provides a useful measure of effectiveness in terms of academic outcomes, and collecting this data allows measurement of consistency across subjects and stability over time.

2. The design of this study

The design of the study described in this paper allowed the researchers to identify the extent of within-school variance in 41 of New Zealand's largest urban secondary schools. An analysis of internal and external assessment results for 15 year olds in English, Math and Science determined the departments where the variation occurred and how that variation compared to national norms. Direct comparison of department results across schools by department and across departments shows where the variability in student academic outcomes occurs. This research categorises schools using the New Zealand decile ranking system from 1-10, similar to 'free school lunches' in the English setting. Schools that have a lower decile ranking, serve disproportionate numbers of students who face challenging circumstances and receive additional funding on a per pupil basis. Schools with a decile 1 ranking serve the highest proportion of minority and economically disadvantaged students, while decile 10 schools serve the more affluent students and are often situated in prosperous urban suburbs.

New Zealand has an assessment system for the senior secondary school called the National Certificate for Educational Achievement (NCEA). This standards based system supports 15-19 year olds to gain 'credits' towards a certificate in subjects that are taught as part of the New Zealand Curriculum. Students can gain credits or 'pass' by gaining either an Achieved, Merit or Excellence grade in a range of internally and externally assessed 'achievement standards' that make up a subject. The academic results of a standards based assessment system can be quantified by school and school type in order to make relevant statistical comparisons. A Grade Point Average (GPA) has been created using a formula. The numerical value for Achieved grades was obtained by multiplying all of the Achieved results in that school and in each of the departments by two. This process was repeated for Merit, which was multiplied by three and Excellence by four. This is a system currently employed by The University of Auckland². By comparing department results to the national statistics by decile the relative success of students within a department can be determined and the value added by the teachers and leaders in each department can be established.

The consideration of statistically reliable ways of identifying 'within-school' variance using publicly available student achievement data is an ongoing challenge for researchers. In order to describe and reveal any evidence that there is a variation in student performance within New Zealand schools, data were gathered and a number of statistical tests were performed. In general terms the investigation involved documenting:

² Starpath: Project for Tertiary Participation and Success (Shulruf, Hattie, Tumen, 2006)

- the raw scores for students in each department receiving an Achieved, Merit or Excellence result in internal assessment and external examination, by department in 2008, and 2009 and 2010 calculated by a Grade Point Average (GPA);
- a study of effect sizes of differences in scores across departments in the 41 schools in the sample in 2008;2009 and 2010
- the internal and external (examination) results for each department by percentage of Achieved, Merit and Excellence;
- the national average results calculated as a GPA and a percentage for comparative purposes, by decile.

The rationale for selection of schools for analysis was based on school roll. Goldstein (1987) argues that with a department size of 60 or more pupils' performance indicators become reliable and meaningful. All schools selected for the quantitative data analysis, had student rolls over 1000 and a minimum of 100 student results are represented within any academic department. In all secondary schools in New Zealand it is compulsory for students to take a course of study in English, mathematics and science until the end of year 11 in order to gain the minimum Literacy and Numeracy requirements to gain the Level 1 certificate. A general science course is highly recommended as compulsory for students at this level. This means that performance across departments at Year 11 can be measured knowing that the greatest majority of students will be studying all three subjects. The data being used is at the student cohort or department level in 2008 and 2009 and 2010. In order to compare data across years the students who have not achieved are included in the GPA calculation.

3. Results

Overall school performance and within-school variation

The following figures show some overall results for schools compared to each other and national norms. The national results for each decile have been calculated from all schools of that decile across New Zealand to allow comparisons between departments and schools that cater for students with similar socio-economic status.

Figure 1 shows the ranking of the 41 school results calculated in terms of the total percentage of 'merit' and 'excellence' results for English, math and science over the three years. The percentages for each department's performance have been calculated over the three years and then a mean has been calculated across the departments to give a final percentage for the purposes of ranking. Schools 8B and 9G are performing well below norms for their decile and school 10E performs at the same level as decile 8 schools whereas the GPA results for school 10E were comparable to decile 5 results.

Figure 2 compares the overall Level 1 NCEA English, mathematics and science performance of students in schools in the sample in relation to decile of school, when the mean is calculated over three years. Figure 2 shows that when using this measure there is a considerable range of performance of schools within one decile. There is a clear overall trend for the higher decile schools to be higher performing but there is variation within the sample. The decile 6, 7, 8, 9 and 10 schools show comparable performance with some outliers. In the decile 1-3 schools where students would be substantially economically disadvantaged, overall student performance in English, math and science at Level 1 is below the GPA of 1.5.

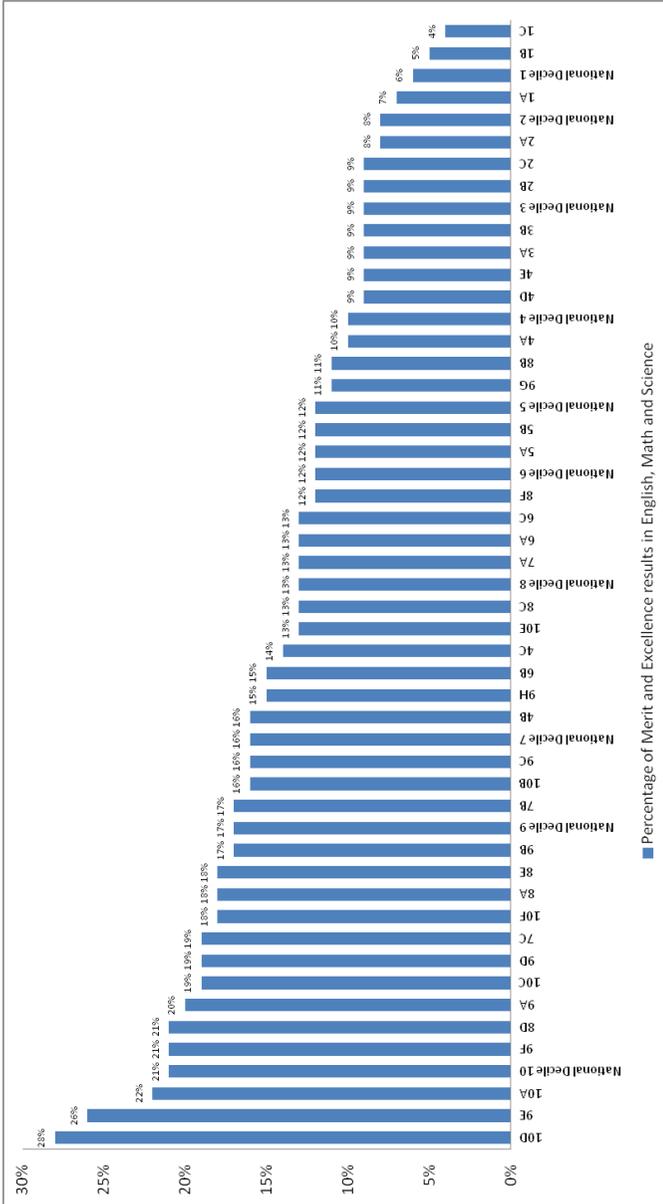


Figure 1. Total percentage of merit and excellence results for English, math and science 2008, 2009, 2010

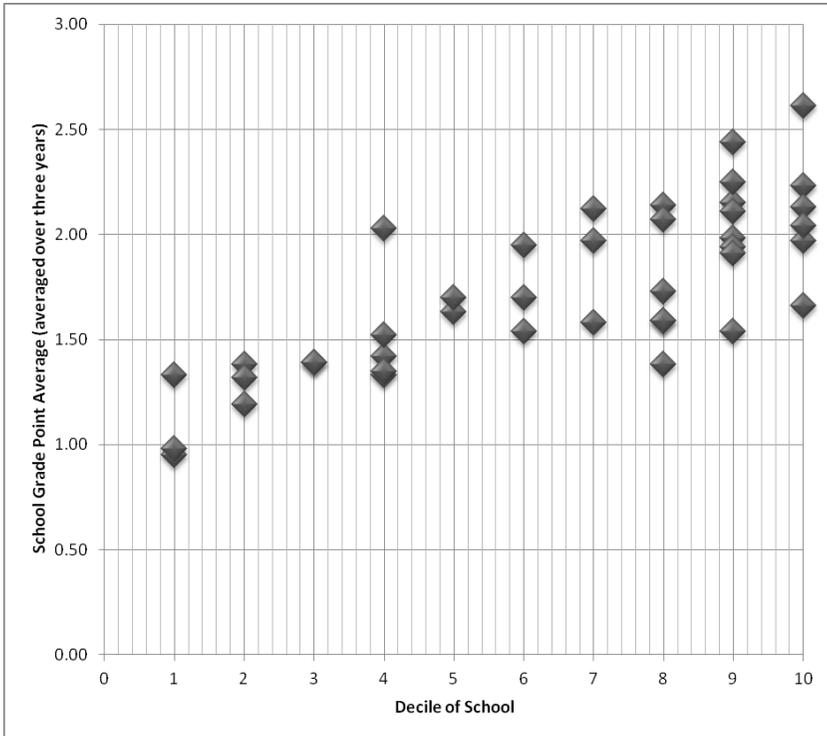


Figure 2. Grade Point Average, calculated from NCEA Level 1 English, math and science results averaged over 2008, 2009 and 2010 related to decile of school.

An effect-size calculation using Cohen’s d (Cohen, 1990) provides an expression of the magnitude of the difference made to student outcomes by the variation in achievement of the English, mathematics and science departments. An effect size of 1.0 indicates an increase of one standard deviation, typically associated with advancing children’s achievement by one year (Hattie, 1992, p. 3). The use of effect sizes in this project highlights the importance of the magnitude of differences, which in this case is between academic outcomes for the same cohort of students within one year in secondary schools. An effect size can be calculated for each school to show the extent of the within- school variation over time but

the exact departments where the differences occur cannot be identified in this analysis. When the effect size was calculated over the three years of 2008, 2009 and 2010, 6 schools out of the 41 had an average effect size less than 0.50, a further 14 had an effect size between 0.50 and 1.0, 18 schools had an effect size over 1.0 and 3 schools had an effect size over 2.0. The variation in student outcomes between English, mathematics and science for these schools is considerable and the problem has not declined over the three years. The effect sizes for the national data for each of the deciles is considerably lower than the individual school effect sizes. The effect sizes for the decile 1,3, 9 and 10 school national results were between 0.5 and 0.1 across three years but the other six national averages were below 0.5 which would suggest that there is limited variation across subjects nationally but the within school variation is inconsistent. These data mirror the 2003 PISA results for New Zealand 15 year olds in mathematics, where 90% of the variance was within school and only 20% was across schools (OECD, 2003).

Figure 3 ranks the schools in order of highest to lowest to show the effect sizes or degree of within-school variation across the sample in 2008, 2009 and 2010. The result shows a significantly different distribution than the ranking of overall school performance in English, math and science described in Figure 1. The decile of a school does not determine the schools' position on the bar graph. The top ranked school for GPA (10D) is the third least likely school to have within school variation. School 8D which is ranked as having the third highest within-school variation in the sample, is an academically high performing school, ranked sixth out of the 41 schools. The lowest ranked school for student achievement (1B) is ranked 4th out of 41 for within-school variation. The national results rank in the bottom half of the graph because the

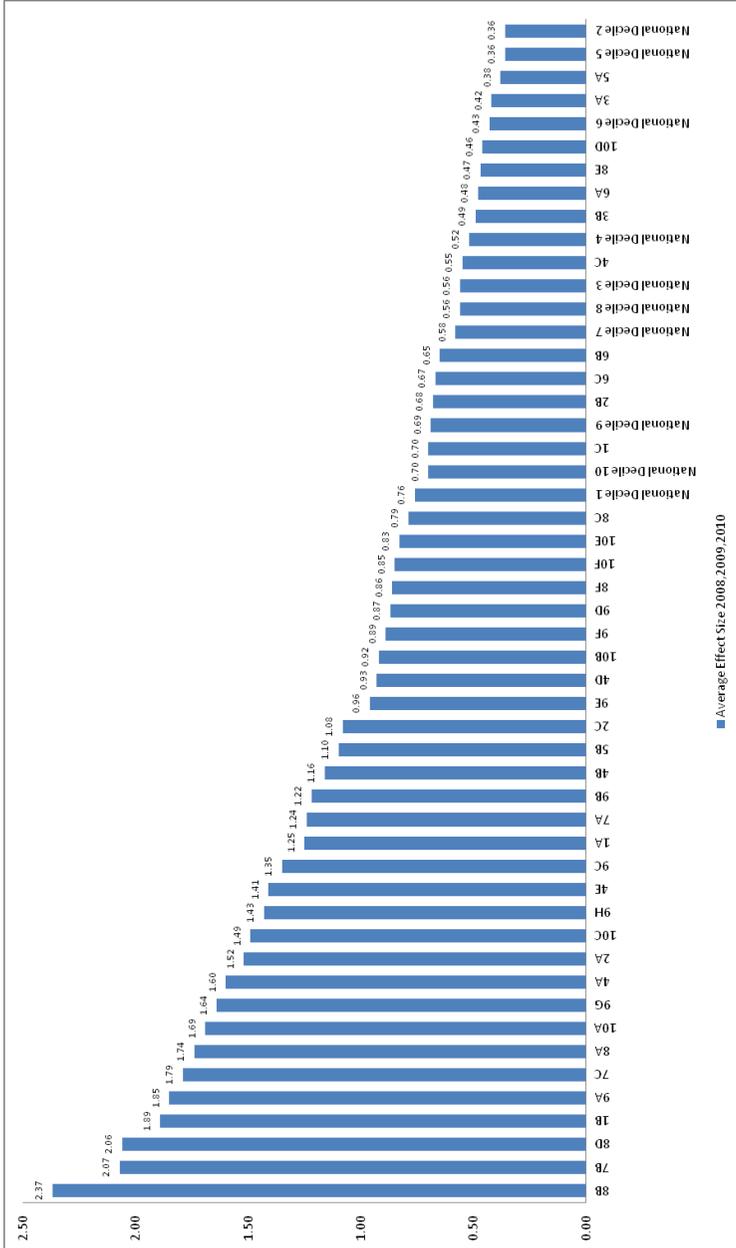


Figure 3: Within school variation shown by effect size calculated and averaged over 2008, 2009, 2010 across English, math and science for 15 year olds

results across all three subjects when compared nationally are relatively even. Thirty schools in the sample have larger within-school variation between the three English, mathematics and science departments than any of the calculations for the national norms for decile.

4. Discussion

The results of this study show that although the national results for each of English, math and science (by decile) show little variance, the variance of student outcomes across subjects and within schools is considerable. These data supports both the 2003 and 2006 PISA findings for 15 year olds in New Zealand, where the within-school variation for New Zealand is one of the highest in the OECD. The variance in results for the same subject across schools indicates that student achievement is not determined by the school a student attends but the department in which they have been taught. Whole school performance can appear 'stable' but a minority of schools perform consistently across departments over time (Thomas, Sammons, Mortimore & Smees, 1997). The comparison of the 2007 and 2008 data shows that in the New Zealand context department performance is also variable by year.

The academic achievements of diverse learners in standards based assessment systems have been mixed (Agnew, 2010). The research in America indicates that although minority students and those from low socio economic backgrounds perform better in a standards based system, there is still a significant gap with their middle class peers (Kannapel, Aargard, Coe, & Reeves, 2001; Madaus & Clarke, 2001; Ortiz, 2000). This study would generally support the literature but Figure 3 shows that the difference in student achievement results for schools drawing on a cohort of students from a similar socio economic

background is variable by department. These mean results over three years allow for anomalies and cohort variability. This comparison is consistent with the views of Thomas, Sammons, Mortimore and Smees (1997b) when they compared the GCSE results of 94 inner London secondary schools over three years (1990, 1991, 1992). They focused on establishing whether school performance was both consistent over a range of six subjects and stable over time, across cohorts. They used a pre-defined set of criteria to identify groups of schools as being 'effective' or 'ineffective'. The results are similar to this study, in that in the English study there was no clear cut picture in 70% of the schools, where there were mixed effects. There was marked within-school variation in student academic results but the highs performance in some subjects and lows performance in others masked the overall school results. Over three years they were able to classify just 9% of the schools in their study as 'broadly more or less effective' (Thomas, Sammons, Mortimore, & Smees, 1997a, p. 191).

Conclusion

Understanding why it is that results can be so varied within a school and from class to class when departments exist under similar senior leadership and governance conditions and almost identical student populations is critical to the enhancement and equity of student achievement outcomes in New Zealand. An explanation of why the variability of student outcomes occurs with a closer more fine grained investigation in schools where the greatest variability exists would reveal some important insights into the reasons for these differences in outcomes. The next steps in this project were to understand how the leadership and teaching practices in a department contribute to student achievement and recently the researcher has investigated the specific middle leadership practices that predict improved student academic outcomes.

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CHAPTER 5

RETHINKING SCHOOL READINESS AND TRANSITION POLICY AND PRACTICE IN EARLY CHILDHOOD EDUCATION (ECE): A WHOLE SCHOOLING FRAMEWORK

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Abstract

This chapter considers recent work on teachers' and parents' perspectives, and practices of school readiness and transition to primary school in Indonesia. It considers how and why different stakeholders in Indonesia prioritize different aspects of school readiness to argue that gaining entry to the favourite school, national policy prescriptions and accountability, and professional knowledge have been the main levers that constraint stakeholders within traditional arenas of school readiness and transition practices. The chapter raises the question of how to rethink different aspects of school readiness, policy and practices that provide the maximum and equitable outcomes for all children. By examining and discussing stakeholders'

perspectives and practices, we advance arguments for a whole schooling framework for school readiness and transition to primary schools in Indonesia.

Keywords

School readiness-transition policy - whole schooling framework

1. Introduction

This chapter contributes to the debate about school readiness and transition policy and practices regarding early childhood education in Indonesia. In general, the role of school readiness in transition to primary school programs has been gaining an increasing attention among stakeholders such as parents, teachers, researchers and education policy makers (Brooker 2002, Bohan- Baker & Little 2004, Cassidy 2005, Dockett & Perry 2007, Dunlop & Fabian 2003, Margetts 2005, Peters 2004). These researchers have reiterated the importance of a collaborative approach to school readiness because of its positive impact on children's transition to primary school.

Kagan and Rigby (2003) argue that the term school readiness is often bias towards children's academic capability such as the ability to read and write. Yet Janus and Offord (2007) articulated the need for school readiness to take a holistic approach that integrates cognitive, social emotional and physical components of the child. Consistent with this perspective, is the call by the National Association for the Education of Young Children (NAEYC) for schools to respond to a diverse range of abilities within any group of children, and that the curriculum in the early grades must provide meaningful context for children's learning rather than focusing primarily on isolated skills acquisition.

A child's transition to school has long been associated with school readiness. Internationally, there is an increasing understanding of the importance of transition for children entering primary schools. Many researchers highlight the potential significance of children's transition to school (Pianta & Kraft-Sayre 1999, Christensen 1998) and as such have developed programs and guidelines to make children's transition to school a positive and successful experience (Broström 2000). A typical example is the Starting School Research Project in Australia which provides examples of effective strategies on transition to school programs and describes the most important issues for children, parents, and educators as children enter school (Kirk-Downey & Perry 2006).

We undertook the research reported in this chapter because available international literatures and research into school readiness and transition to primary school on the perspectives of teachers or parents were mostly western in nature. Even in developed countries literature on school readiness and transition issues are debatable as diverse approaches and concepts have been advocated. In Indonesia, there has been no research that investigated comprehensively on children school readiness and transition to primary school. Policy, concept and practice on school readiness and transition are also still debatable among policy makers, teachers and parents. Further there have been relatively few attempts to investigate the perspectives and practices of school readiness and transition from a whole schooling framework. Therefore this chapter contributes to our understanding of current concept, policy and practice of school readiness and transition related to ECE in Indonesia.

This chapter, grounded in Bronfenbrenner's (1998) Ecological Theory, explored the perspectives and

practices of teachers and parents on children's school readiness and transition to inform our understanding of key ideas and values related to ECE policy and practice in Indonesia.

1.1. Indonesian Education Policy Context (ECE and Primary Education)

The Government of Indonesia is fully committed to providing quality ECED services to all children. Several strategic government documents underscore this commitment; including the National Education System Act 20/2003; the National Plan of Action (Indonesia's Education for All plan); Presidential Regulation 7/2004 on National Medium-Term Planning for 2004–2009; and Government Regulation 19/2005 on National Standards of Education (including the National Early Childhood Education Standard which comprise the Children Developmental Milestones Standard and Early Childhood Teachers Standard; Early Childhood Program Standard; and Management Standard). These documents reinforce the important role played by the education sector in promoting early childhood services as the panacea for future manpower development for the country.

Programs on early childhood education and development in Indonesia are planned to prepare young children for primary school and to contribute to the government's national development vision of a peaceful, fair and democratic society. It adopts generative synergic approach that combines good health, nutrition, and appropriate cognitive stimulation for healthy development in the early years. It is believed these areas constitute fundamental elements for achieving high levels of education and human capital formation later in life (Sardjunani & Suryadi 2005).

Indonesian government has a broad policy to promoting basic education by improving access and expanding learning opportunities for all school aged children. Based on the constitutional policy on education for all Indonesian citizens, the government keeps increasing the participation rate of primary school children and has instituted measures to provide smooth transition from kindergarten to formal schooling and prevent students from dropping-out. Scholarship for children from poor families was instituted to ensure vulnerable children also access basic education. The government of Indonesia is also committed to increasing the quality and relevance of basic education so all graduates have basic competencies required for coping in life and continuing to higher level of education. There is also commitment to increasing the efficiency of education resource management and enabling all basic education institutions to carry out their function efficiently and effectively.

In most cases, the effectiveness and quality of primary schools in Indonesia have been increasing, though they are slightly worsening in the last few years, because of Indonesia's economic crisis. Future challenges still need to be confronted in making compulsory basic education achieve its intended outcomes, such as supporting students' survival in the wake of economic crises, and developing children's full capacities to live and work in dignity, make informed decisions, and continue learning.

Most primary schools in Indonesia (93%) are public schools which are managed by the government (Sardjunani & Suryadi, 2005). Nationally, the average class sizes in primary schools are approximately 27, while upper-level classes included between 30 and 40 students. Some schools offer an accelerated learning program, where students with good qualification can

finish primary school in five years. There are different standards of public primary school, such as regular public primary school, national standard primary school, model primary school, and international standard primary school. Each school has different policy related to their requirement in accepting children from early childhood into primary school.

Although it is documented that education policy in Indonesia has succeed in making almost all primary school-age children get primary education, it does not by design fulfil the demands of basic learning needs as stated in the World Declaration on Education for All (EFA) in March, 1990, or even the educational demands of Indonesia to make the education system accessible to all children (The EFA Assessment, 2000). This is due to Indonesian government's limited budget to support the provision of basic educational facilities and learning materials as well as the provision of basic salaries for the education personnel, including teachers (The EFA Assessment, 2000).

1.2. Teacher Education Policy Context

School readiness and transition to school cannot be discussed without considering teacher qualifications and policy context. A fundamental change in teacher education in Indonesia is under the law number 14/2005 on teachers and lecturers. It defines professional teachers as those who meet academic qualification of bachelor degree and pass the education for teacher profession for a period of one year or equivalent with 36-40 credit hours on the completion of bachelor degree. Of the 2.78 millions teachers in Indonesia, 1.7 million have not held their bachelor degree, and 70% of these are teaching in elementary schools (Kartadinata, 2009).

Policy on National Standard for teachers' professional competency is stated in Law number 14 and

government rule number 19 in 2005 which describes a teacher as a professional educator with a main task to educate, teach, guide, train, and evaluate children's development. Further in Chapter I Article 8 of the same document, it is stated that the obligation of a teacher is to have an academic qualification, competency, educational certificate, and be fit physically and psychologically. In the government rule number 19 authorized in 2005, a teacher's competency is explained more specifically to include competency in pedagogic, professional practice, personality, and social behaviors. The policy refers to the teacher's competency to understand children's development and to conduct teaching at a professional level.

The implementation of the law on teacher competency in various institutions, including schools is one of the biggest challenges facing Indonesia. It is related to limited percentage of teachers who have an appropriate qualification. Approximately 28% of Indonesian teachers had diploma/graduate level qualifications. Specifically, there is only about 6% of ECE educators currently serving children who have a diploma qualification, and less than 50% of teachers have ECE professional training in schools or colleges. Besides, only few universities currently offer early childhood training programs in Indonesia (World Bank, 2006). The levels of qualifications have major implications for understanding issues related to school readiness and transition to school. We discuss this later in our findings.

1.3.Issues on Education Policy in Indonesia

Indonesia has a variety of ministries and government agencies that coordinate early childhood education and development. A total of six agencies are responsible for the welfare of children aged 0 to 6: the Ministry of National Education; the Ministry of Religious Affairs;

the Ministry of Social Welfare; the Ministry of Health; the National Family Planning Board; and the Ministry of Women's Empowerment. This has resulted in a surfeit of different interventions that serve young children. On the one hand, there are early childhood education services for children aged 2 to 6, which focus on academic skills, and on the other hand, there are early childhood care services, which offer health, nutrition, and care services to parents and younger children (aged 0 to 3).

A major challenge facing the operations of these ministries is the overlapping functions and responsibilities including fragmentation in policies and programs. Curriculum development, inspection processes, training, and policy planning are not synergized leading to conflicting information to teachers, parents with a spillover effect on children. For example, there is absence of continuity between programs for younger children aged 2 to 4 and kindergarten services for children aged 4 to 6. In many respects the child's transition from preschool to grade one becomes traumatic (Sardjunani & Suryadi, 2005).

The apparent persistence of difficulties children and their families encounter in terms of school readiness and transition has resulted in more debates on school readiness and transition to primary school in Indonesia. Other challenges include a large number of young children who need to be covered, limited educational facilities and infrastructure, insufficient ECE teachers' professional competency, aspects of government education policy which is problematic for parents and children.

Specifically in the capital city of Jakarta, since the school year of 2010/2011, there is a new policy system that requires registration of children before they enter primary school. This on line system of

registration which is believed by education policy makers as more open and easier for parents, is rather a barrier to many parents who do not have access to the required technology or let the least have the requisite knowledge to conduct the registration on their own. Also, the requirement for entering a regular public school is only based on age, where older children have more opportunity to be accepted into a regular public school than other capable children who might not meet the required age of 7 years. The only opportunity for younger children to get registered to be accepted into primary school is if they have a recommendation from a counselor or psychologist. This also places extra demands on parents. In addition different requirements apply to children entering other kinds of public schools, which are recognized as 'favourite schools.' These schools, which include the National Standard Primary Schools and Model Public Schools, conduct a range of selection tests for children entering their primary schools.

We believe that this competitive condition seems to influence teachers and parent's perspective and practice in supporting children's transition to enter a 'better standard' public primary school. We argue that it is critically important to review Indonesian National policy prescription and accountability as well as teachers' professional knowledge and parents' expectation to have their children entering a favourite public primary school. We believe that understanding how these variables shape how school readiness concept and transition are currently practiced in Indonesia is an important first step to informing future transition policy and practices that are equitable and fair to all children and families.

2. Literature and theoretical framework

A change in broadening the understanding of school readiness has been the recognition that the task of

preparing children for school is a community responsibility, not only a family responsibility. In view of this, 'readiness for school' is starting to be used as a benchmark to measure the degree to which early childhood policies, programs and parental support have been effective at a community, as well as a societal level (Janus & Offord, 2000).

Arguably, a current conceptual view on school readiness is located in an ecological paradigm (Emig et al., 2001). An ecological view of school readiness (Bronfenbrenner, 1998; Johnson, 2008; Emig et al., 2001) recognizes four interrelated components: children's readiness for school, school's readiness for children, and the capacity of families and communities to provide developmental opportunities for their young children. Kagan and Rigby (2003) state that the term school readiness is often misunderstood because of a bias to identify 'readiness to learn' (having the neurological capability to start learning of specific material) with 'readiness for school' (having a capacity to meet school requirements and to adjust with the curriculum). In addition, there are needs to be a 'ready society' - a society-wide understanding and acceptance of the importance of investment in the early years of childhood, supported by government programs, policies and funding (www.rch.org.au/emplibrary/ccch/PB10_SchoolReadiness). Dockett and Perry (2007) stated factors that influence readiness to include family, community and school expectations, and children's attributes.

Astbury (2009) maintains that transition is about supporting a child to feel valued, comfortable, and ready to learn. Transition is a process rather than an event and is built on relationships between all stakeholders in education, for example, children, their families, educators, and community. Transition to school can be a positive or negative experience.

Children's first experience of school and their attitude to school can greatly affect their further learning outcomes, and their cognitive, social and emotional development.

There are a number of factors that either facilitate or hinder school readiness and transition process at either an individual, family or community level. These include socioeconomic status (which often interacts with race or ethnicity), the child's health, family background characteristics, particularly the mother's education, single- parent status, and mental health, the home and community environment, including risk factors and literacy-related factors; and participation in some type of quality preschool program.

Dockett & Perry (2001) explained that transition programs which involved children, families, educators are very important for its aim to make school comfortable and familiar place for children starting school. An effective transition program has the potential to help children and their families feel comfortable, valued and for children to be successful in school. It also has the potential to assist educators as they develop positive learning environments for children starting school.

2.1. Contemporary View of Child Development

As there are numerous theoretical perspectives on child development, the concept and practices of school readiness and transition to school also vary. Before we discuss the main theoretical perspective scaffolding this study, we would first attempt to draw attention to some child development theories that have implications for school readiness and transition to school. Meisels (1999) pointed to four theoretical approaches to looking at children's readiness for school. These include nativist/maturationist,

empiricist/environmentalist, social constructivist, and interactionalist perspectives.

2.1.1. The nativist view

The chief proponent of nativist theory is Arnold Gesell (Lerner, 2002). The nativist perspectives conceptualises readiness as 'something inherent within the child', with little or no recognition for the impact from environmental factors. In this view, whether or not a child is ready for school is a function of maturational processes based on the child's biological capability to perform adequately in school (Berk, 2006; Lerner, 2002). This theoretical approach claims that children's proficiency in school is a function of children's cognitive and physical maturation (Halfon & Hockstein, 2001). The Gesellian perspective views development as occurring in predictable stages that are regulated by forces internal to the child and that environmental inputs have little impact on this natural unfolding process (Halfon & Hockstein, 2001; Lerner, 2002). Although this view does not deny the power of the environment to alter a child's life, the primary contributor to child development and readiness is ascribed to the genetic composition of the individual child. In other words, the true meaning of development lies in the ideal sphere of inner development, rather than the phenomenal areas of external activity (Agbenyega, 2009). Conceptualizing school readiness in the Gesellian perspective would mean that all children need to follow the same learning processes, the same testing and with differences in their rate of performance solely defined by reference to the particularity of their genetic make-up (Halfon & Hockstein, 2001). It can be argued that a biological and maturationist perspective is limiting in

terms of the support children would receive to prepare them and transit to school because external influences such as teacher practices, kinds of tests, families practices, economic circumstances and school policies which may have either positive or negative effect on the child are completely neglected (Rankin & Vialle, 1996).

2.1.2. The empiricist view

An empiricist conception of readiness, defines readiness entirely in terms of the practical characteristics of the child's behaviors. Because the empiricist or materialist view focuses on the external evidence of learning children are often subjected to objective codification and measurement of their abilities through universal standardized instruments (Meisels, 1999). This approach concentrates on what the child can do and how the child behaves to identify the developmental truth about the child (Berk, 2006; Daniels, 2003). This view also known as a cultural transmission (Kohlberg & Mayer, 1972) or environmentalist model (Smith & Shepard, 1988), reflects an externally driven approach to development. In this regard the child's development is assumed to be controlled nearly totally by events and conditions that dominate his or her social and cultural world. The key conceptual perspective in the empiricist paradigm is a view that readiness is something that lies "outside the child", or something absolute and external to the child that can be learned (Crain, 2000). Therefore, readiness is perceived in terms of proficiency with a specific set of skills that have to be acquired before a child starts school. The focus is on external evidence of what children have learnt, such as knowing colours, shapes, how to write one's name, letters of the alphabet and counting to ten. With this perspective in mind children are coached in these related skills followed by universal testing on specific curriculum

tasks to determine if the skills children are taught reflect mastering these skills, which in turn reflects their school readiness (Meisels, 1999). The key idea in this paradigm is that children acquire skills and information through external guidance or teaching (Crenic & Limberty, 1994; Daniels, 2003).

2.1.3. The social constructivist view

The social constructivist view perceives readiness as a set of ideas or meanings constructed by the people in their communities, families and schools (Shonkoff & Phillips, 2000). This approach, because it conceptualizes readiness as a function of the meanings and values assigned by an individual, school community and cultures, it presents complex factors for young children's learning and teachers' instruction (Pianta & Sayre, 1999). The complexity is located in the plurality of social and cultural practices, and theories that teachers allude to in preparing children for school (Fleer, 2008, Hedegaard, 2008). Under this consideration, child readiness for school may differ from one community to the next, so it "provides little or no guidance on how to resolve differences that are found among communities, schools or even classrooms" (Meisels, 1999 p.48). In other words, a child who may be ready in one community or even in one school in the same community may not be ready in another school or community.

In this regard it can be argued that readiness is situationally specific, locally generated, and highly relative (Graue, 2006). Some scholars therefore reiterated the argument that readiness "cannot be defined without reference to how children's behavior and development are supported and what the children should be ready for" (Love, Aber, & Brooks-Gunn,

1994, p. 2). The social constructivist view again provides insights into differences in values, expectations, and norms for their children in different local communities. Differences in parental wealth, ethnicity, education, and background also account for some of the differences that may be visible in different children. Further, differences also flow from variations in many other sources (i.e., the teaching staff, school building principals, or policymakers). This theoretical notion again reinforces the idea of the complexity of school readiness and therefore, in order to understand and assess a child's readiness, it is essential to take into account the context in which the child is reared and the setting in which the child will be educated (Shonkoff & Phillips, 2000; Cicchetti, 2002).

2.1.4. The interactionalist view

The interactionalist perspective is a bidirectional concept, which focuses on the "children's current skills, knowledge and abilities and on the conditions in which the children are reared and taught" (Meisels 1996, p 410). This perspective attends both to what children know and to the capacity of schools to adapt experiences for children who demonstrate different strength and needs (Janus & Offord, 2000). This comprehensive view integrates "an emphasis on child development with a recognition that the perception of the individuals in the child's environment shape the content of what is taught, learned and valued" (Meisels, 1999 p. 49). In doing so it looks at the contributions of the child and the school to understand readiness.

Readiness is a relative term because different children are prepared for different experiences, and different children respond differentially to apparently similar environmental inputs (Shonkoff & Phillips, 2000). Although it can be applied to individual children, it is

not something in the child, and it is not something in the curriculum. It is "a product of the interaction between children's prior experiences, their genetic endowment, their maturational status, and the whole range of environmental and cultural experiences' that they encounter" (Meisels, 1996, p. 409).

This view holds that readiness is a relational, interactional construct reflecting a joint focus on the child's status and the characteristics of the educational setting as well as the product of a set of educational decisions that are differentially shaped by the skills, experiences, and learning opportunities the child has had and the perspectives and goals of the community, classroom, and teacher (Bronfenbrenner, 1992; Johnson, 2008).

It is important for readers to have a sense of the perspective we brought to this study. Broadly we adopted Bronfenbrenner's concept of the ecology of human development and the whole schooling perspective that view child development as occurring in nested settings throughout the life course (Bronfenbrenner 1998). These nested systems connect to family and home, school, community and society (Emig & Scarupa 2001) which directly or indirectly impact on the child's development. Invariably, activities joined together by family, teachers, community, and government, are important parts of ecological process for children entering primary school as the processes of transition are related and combine the most important aspects in the child's life (Yeo & Clarke, 2007). Thus, child's transition to school and their ability to continue learning is influenced by a variety of personal and family characteristics, societal and family trends, contextual and life experiences. It can be argued that since these nested systems are not static, the concept of childhood and transition itself are

not constant but are fluid and embedded in social, political, economic changes.

2.2. A whole schooling framework

We approached this study with the whole schooling framework in mind because it aligns with Bronfenbrenner's bio-ecological systems theory (Bronfenbrenner 1998). A whole schooling framework to school readiness and transition considers complementary systems within and outside the school, working together for the common good of the child, teachers and families. The key dimensions included: school cultures and environment; curriculum development and school practices; teaching and learning; internal and external partnerships with parents and community organisations; services and ethics of care. A whole schooling framework sits at the heart of collaborative practice between preschools and primary schools and considers all the members of the school community in all the areas of children's life (*International Journal of Whole Schooling* at http://www.wholeschooling.net/Journal_of_Whole_Schooling/IJWSIndex.html).

3. The Research context

Our work took place in Indonesia, Southeast Asia's largest country that spread across a chain of thousands of islands between Asia and Australia with 17,508 islands, 33 provinces, more than 300 ethnically distinct groups, 583 local languages and dialects, and 219 million people.

Due to the considerable size of Indonesian Islands and the potential kindergarten and primary school aged population across Indonesia, we reduced the study demographic to the capital city of Indonesia and the country's largest city, namely Jakarta. Jakarta which

is located in the northwest coast of Java, has an area of 661 square kilometres (255 sq mi) and a population of 8,490,000. It is the [most crowded city](#) in Indonesia and in [Southeast Asia](#), and also the [twelfth-largest city](#) in the world. As a special Capital Territory, Jakarta is the country's economic, cultural and political center. The cities/municipalities of Jakarta are [Central Jakarta](#), [West Jakarta](#), [South Jakarta](#), [East Jakarta](#), and [North Jakarta](#) (Statistical Yearbook of Indonesia 2005/2006).

3.1. Methodology

We located this research in an interpretive framework as we wanted to represent the voices of participants through thick and rich reporting. Sheppard (2006) argues that an interpretivist's perspective is concerned with how people make sense of the world, and the understanding that there is –no single view of the world, and that individuals and groups can interpret the world in widely different fashions.

3.1.1. Participants

Initially we sent a letter application for permission to conduct research to Directorate of Early Childhood Education, Ministry of National Education and Jakarta Divisional Head of Kindergarten and Primary School, with explanatory statement and consent forms for teachers in Jakarta. Parents whose children are entering primary school in every region were also contacted to volunteer for participation in the research. A summary of those who agreed and participated in the research is summarised in Table 1.

Participants	Organisation	Number
Teachers	Primary school	25 (5 representing cities of Jakarta)
Teachers	Kindergarten	25

		(5 representing cities of Jakarta)
Parents	Parent/teacher association members	25 (5 representing cities of Jakarta)
Education Policy Makers	Directorat ECE, Ministry of National Education	3

Table 1 Distribution of participants in the study

3.1.2. Data collection

We collected data through focus group discussions and individual interview from education policy makers. Fifteen focus groups of five members in each group were conducted with primary, kindergarten teachers in their schools and parents respectively in the various schools' parent-teacher common rooms. Some questions were developed to guide the focus group discussions. Sample questions included:

- What is your understanding of school readiness?
- What do you look for in children who are ready for school?
- What policies guide the way you support children transition to primary school?
- What programs have government put in place to support children's transition to primary school?

Each focus group and individual interview lasted about an hour. The discussions in group are important for describing and understanding perception, interpretation, and beliefs of the participants to gain some understanding of transition (Liamputtong & Ezzy, 2005).

3.1.3. Data analysis

We used Ritchie and Spencer's (1994) 'Framework' analysis to analyse the data. First, we developed a coding scheme which guided us in reading all the focus group transcripts several times to search for teachers' and parents' shared perspectives and practices of school readiness and transition. This stage is what Ritchie and Spencer (1994) refer to as data familiarisation. While doing this, we examined the verbal comments in relation to Bronfenbrenner's ecological system theory, and juxtaposing it with the Whole Schooling Principles. We then refined the coding scheme and applied a thematic framework, grouping data which appear to have the same level of common strand to extract relevant themes.

3.2. Findings

The data reveal three themes from the analyses. These themes are related to 'Gaining entry to the favourite school,' 'National policy prescriptions and accountability,' and Professional knowledge.'

3.2.1. Theme 1: Gaining entry to the favourite school

The findings indicate that school readiness is conceptualised by the participants in academic terms. The participants perceived cognitive and language skills or curriculum areas such as literacy and numeracy in determining children's readiness for school. Their perspectives were relate to young children having academic skills as a way of determining the individual child's potential against some set of standard expectations or desirable attributes. For example, some parents said:

in my opinion, when children are entering primary school, they should be ready to read, write, and count.

These skills are very important to be successful in primary school (parent focus group transcript)...we cannot deny that children should be ready for the academic tasks at primary school. Further, it is the requirements to be accepted in a 'favourite' school (Parents focus groups).

The kindergarten teachers also appeared to concentrate on teaching children reading, writing and counting as a preparation to enter primary school as some public primary schools still conduct a selection test for children.

In the second semester, we increase the level of reading, writing and counting skills for children. We know that to enter a regular public PS, the requirement for children to be accepted is only their age. However there is an exception that says younger children can enter PS if there is a recommendation from experts such as counselor or psychologist. Besides, to be accepted in a national standar PS or a public model PS, children have to do a range of test. (kindergarten teachers' focus group transcript).

For these reasons it appears that parents and teachers would rarely provide chances for children to express their feeling, interest, and creativity but rather use intensive academic training to prepare them to be accepted in a favourite primary school or to have a success in primary school.

3.2.2. Theme 2: National policy prescriptions and accountability

The findings indicate that some teachers had concerns about the implementation of government's policy and prescriptions on accepting children entering PS. This affects the transition programs currently practiced by

stakeholders. For example, some kindergarten teachers thought,

it is difficult to implement all these different things...teachers have to work very hard to teach children to read, write and count so they can adapt with the primary school tasks later, this is 'the policy'...what matters at the end is how we give account of our teaching...you can measure it by the number of children who can read and write (kindergarten teachers' focus group transcript).

Other teachers argued:

We have our local policy in our school to teach the children. As we know that recently our government do not allow us and this is really firm advice not to teach the kindergarten children to read and write. I think there might be some benefit with this policy. But I feel pity with those children who have already interest to learn reading. (kindergarten teacher focus group transcript).

Some PS teachers describe that:

Now, the government provides an on line system policy for students registration to primary school. So we choose the older children who are more ready to enter primary school. With this policy (now is the second year policy implementation), there were about 50% children in our school who did not graduate from kindergarten last year. Most of them were not ready to learn in primary school. Many children who entered our schools could not read, write and count yet. Even there were many who will finish their first year in grade one, have not had their capability to read. (PS teachers' focus group transcript)

In this respect, we recognize that there are specific issues related to Indonesian education policy and school policy context. For these reasons it appears that kindergarten and primary school teachers still struggle with the dilemma in implementing government's policy prescription related to supporting young children entering PS.

3.2.3. Theme 3: Professional Knowledge issues

The third theme relates to professional knowledge of teachers with regard to early childhood development. The results suggest that the majority of teachers lacked current research knowledge in child development, school readiness, and effective components of transition to primary school. Therefore they emphasise academic competence in the form of reading and writing. This was revealed by the education policy makers' statements:

we know that our government encourage teachers to provide a good environment for children to be ready to school. So we expect that teachers should implement learning through play and cater for all aspects of children's development but the challenge is that we have limited number of professional teachers in early childhood area (Interview Education policy makers' transcript).

Again, there is evidence in the data to suggest that the kindergarten and the primary teachers who participated in this study were not receiving the needed professional development that could support their professional and pedagogical knowledge in school readiness and transition to school:

Some of us do not have any formal training in school readiness. We only know that if children are able to read and write then they are ready to enter primary

school...we do not concern ourselves with any other area of the child's development... regular training and resources can help us support the children (Kindergarten Teacher focus groups transcript).

We have a special program...I follow other schools. We have a preparation program for two weeks. We teach children intensively to practice again their reading, writing and counting. We group the children, about ten children in one class, those who already can read, are in the same group. We also give homework for children every day, so they can learn at home too. (kindergarten teachers' focus group transcript).

Other PS teachers added:

We have an orientation program that is three days for the children so they can adapt with school environment. We also ask children whether they are graduated from kindergarten, and ask them whether they have learned reading, writing and counting at kindergarten. The first three days, we do not give them academic writing task. Days after that, we give an extra course after school for children to read, write and count. We have a classical and individual support for students. We also have peer tutorial for teaching other children who can not read, write and count yet. (PS teachers focus group transcript).

In this respect, we recognize that there are specific issues related to Indonesian education policy and school policy context. So far there are limited numbers of teachers who have knowledge in early childhood development in addition to a lack of collaboration and sharing of information between kindergarten teachers and primary school teachers that could be used to influenced the practice of children's transition to PS.

We argue that all the three themes are interrelated and also too complex to cover in this chapter. We

therefore provide a brief discussion of the issues related to our findings.

3.2.4. Emerging Issues

Based on the findings of this pilot study we come to agree with scholars from different disciplines that readiness does not exist only in the child, but it has united elements such as families, early childhood settings, schools, neighborhoods, and communities (Kagan & Rigby 2003), and yet the participants in this study perceived school readiness in terms of reading and writing.

Children's readiness for school, is essentially based on the capacity of schools, families and communities to collaborating to provide developmental opportunities for their young children (Emig & Scarupa, 2001) and readiness initiatives must be supported by government programs, policies and funding (Dickens et al. 2006, Lynch 2006). Yet we found in this study that readiness and transition is solely the responsibility of the schools which focused on reading and writing without any concern for other aspects of the child's development.

The competition to get a child to a favourite school, government and curriculum accountability, and the lack of professional knowledge prove to be strong barriers to school readiness and transition to school. As the focus is on isolated constructs of development, it appears development is considered by the participants to be exclusively inherent in the child thereby neglecting the impact of complementary environmental and school factors espoused by the Whole Schooling Principle. Further there are other factors that should be negotiated such as differences in the physical environment, differences in the number of children in the class, as well as curriculum and teaching strategies. Yet we found in this study that

there are some discontinuities in the transition program and support given by teachers and parents which is still based on academic skills. There is clear evidence that at this stage, the concept of school readiness and transition to primary school in Indonesia has not been integrated with Indonesian goals which are to provide a positive environment for young children, including the psychosocial aspects of development. School readiness as it is currently conceptualised and practised in Indonesia has limitations, because it is considered as a simple product of maturation or chronological age with a focus on specific characteristics and capabilities of the child (Crnic & Lamberty 1994, Kagan & Rigby 2003). This means that when the child achieves high scores then he/she is believed to be ready for school. It brings a consequence that early childhood services, schools and communities are not involved in promoting school readiness in line with a whole school approach.

Since academic skills and age constitute the power for transition, traditionally the education system in Indonesia sought to control children's experiences and dispositions and to ensure that there is reproduction of generational notion of capable and incapable children who must enter school through a fine academic mesh. This approach foregrounds the uneven relationships that exist between policy and practice, and between schools and families. The heterogeneity of factors that are responsible for school readiness and transition means neither academic skills nor age should be considered as natural categories for selection into primary schools. Socio-cultural process, school ethos and the whole child should be considered in school readiness and transition programming to accord children the right to be, and to be accepted into school.

We argue that a good transition program must consider the child's ecology and complementary systems in families, school culture, policy procedures, training and resources to provide a Whole Schooling framework to transition because what happens within families will influence a child's development.

4. Conclusion

In this chapter we have discussed the perspectives and practices of teachers and parents and education policy makers related to children's school readiness and transition to primary school in Indonesia.

Several questions emerge from this study regarding whether transition to primary school is a one-off event or a bridging process. Ideally transition programs should be holistic and focus on building relationship between children, families, early childhood settings and schools. The results enlightened us to think about who should be responsible for preparing children for transition, and the challenging question about the place of school readiness in transition to school programs (Kitson 2002). One important idea that emanated from this study for us is that transition to primary school may vary with respect to context, however, alluding and framing transition within a Whole Schooling Framework promised establishing collaborative approaches that ensure a comprehensive and quality transition programs no matter what context it takes place.

The starkness of the Indonesian school readiness and transition to school policy and practice dramatically foregrounds the disjuncture between school as a social institution and the society in which it takes place. This has serious ramifications for children in preschools and those entering primary schools for the first time. It also not far-fetched to say that poor transition practice would affect children for a long time in their schooling.

In conclusion, rethinking the transition policy for Indonesian context is really crucial. The result of this study suggests that at this stage, the government prescription for accepting children into primary school should be reviewed. There should also be a transformative approach to ensure notable arrangement between kindergarten teachers, primary school teachers and parents with children entering PS are implemented. Developing a continuous curriculum framework across educational contexts is also fundamental to having a smooth transition program for children.

This chapter is not in any way claiming universal truth. We recognised that the participants are a selected few, and therefore this is not a representative account of the Indonesian situation with respect to school readiness and transition to primary school but a snapshot into what pertains to school readiness and transition for readers to draw their own conclusions.

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CHAPTER 6

BUILDING LOCAL NETWORKING IN EDUCATION? DECISION-MAKERS' DISCOURSES ON SCHOOL ACHIEVEMENT AND DROPOUT IN PORTUGAL

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Abstract

This chapter focuses the commitment of municipal authorities on school achievement in Portugal. More concretely, it centers the analysis on their perspectives, actions and networks in face of school dropout and underachievement. According to educational policies, these are central issues concerning the roles and skills that local

authorities as political institutions must develop throughout the country.

In that way, it draws some considerations on the conceptual framework of the research and addresses some methodological concerns. It moves to present a brief review of relevant education policies in Portugal to our purposes. Finally, the research outcomes, which result from content analysis of education councilors' discourses on school achievement, will be debated on two dimensions: perspectives on school achievement and school drop and ways of networking in education.

Keywords

Networking in school education – school achievement – school drop-out

Introduction

In the light of perspectives based on social justice, citizenship and social rights, school drop out and underachievement that affect mainly specific social groups gain a particular height in Portugal, suggesting that the social right to education *per se* is an insufficient reminder to policies and social practices to find ways of changing processes of school marginalization and exclusion. Nevertheless, the involvement of local authorities in the promotion of school achievement in the country has been a central axis of national policies in education during the 2000s.

The main assumptions underlying this is that local authorities would achieve better results than the central power in diminishing pupils' disaffection from school and might contribute to more active educational communities as the result of the network building processes among community groups, organizations and residents. This is in line with international research that emphasises the value of educational networks in other European countries, such as

England, France or Finland (Chapman & Hadfield 2010).

This chapter focuses the commitment of municipal authorities on school achievement in Portugal. More concretely, it centers the analysis on their perspectives, actions and networks in face of school dropout and underachievement. According to educational policies, these are central issues concerning the roles and skills that local authorities as political institutions must develop throughout the country¹.

In that way, the chapter draws some considerations on the conceptual framework of the research and addresses some methodological concerns. It moves to present a brief review of relevant education policies in Portugal to our purposes. Finally, research outcomes, which result from content analysis of local authorities' discourses on school achievement, will be debated on two dimensions: perspectives on school achievement and school drop and ways of networking in education.

1. The conceptual framework

Within the framework of extended forms of citizenship and social justice (Bernstein 1996; Young 2000), the problems of school underachievement and school dropout need to be questioned and outlined in conceptual as well as pragmatic ways (Araújo 2008; Sousa 2007). Stoer and Araújo (2000) have underlined that local authorities should be involved in educational policies concerned with equality of opportunities, in a context where a significant number

¹ It is worth mentioning that 2012 is being a year of severe social, economical and financial crisis. The Education Ministry does not appear to be too much concerned on these policies issues. Therefore, the paper is focusing on policies that although still in place, start to face difficulties in keeping momentum.

of children and young people were leaving school. In our view, besides the analyses produced by social and cultural reproduction theorists in the 1970s (e.g. Bourdieu & Passeron 1970, Bernstein 1971), which highlighted the importance of social class and symbolic reproduction, as well as cultural production theorists (Willis 1977), with their emphasis on youth cultures and resistance to schooling, other perspectives should be included in order to frame and understand the problem of school underachievement. Ball, Maguire and Macrae (2000) stress young people's marginalization in the "new times" of belief in "individual choice", while their opportunities are clearly stratified, dependent on indicators as social class, family and educational background, sex, ethnic origin, etc. Similarly, other studies stress schools significance to promote and maintain cultural dialogue among pupils and students from different cultures (Cortêsão & Stoer 1999; Charlot 2009; Young 2011) and are a relevant reminder for this framework. They are attempting to create room for manoeuvre, introducing concerns for social justice and the recognition of differences. Moreover, the emphasis that arises from Bernstein's (1996) democratic pedagogical rights makes clear the crucial role of *enhancement*, *participation* and *inclusion* as rights that schools need to accomplish together with different stakeholders so that they can be fostered for all children through different pedagogical devices. As several authors have underlined, these are tasks that imply both networks and cooperation emerging from local institutions to schools and vice-versa (Chapman & Hadfield 2010; Muijs, West & Ainscow 2010).

Thus, it is unavoidable to ask: are local authorities actual supporters of the social and pedagogical rights of pupils from different social groups? Do their discourses and practices reveal awareness of the need to provide equal conditions and hold up those who are

more distanced from school culture? How do they envisage the education-based networking among community groups, organizations and residents? Which are the aims and purposes for this type of local networking? Is networking seen as a way of providing more equality among the poor?

The involvement of local authorities and their perspectives and actions regarding school achievement is at the core of this chapter. Projects of community education and local development underline the importance of the articulation above to promote school achievement (Loureiro & Cristóvão 2010; Portela & Gerry 2002). The chapter inquires into the importance of creating networks between different entities, including non-official ones, for tackling educational problems.

Certainly the concept of *network* needs to be clarified as it could be a new buzz-word that appears to translate all kind of actions that bring a new horizon by connecting diverse agents. Different contributions are of relevance here: *The Actor Network Theory* by Calloun, Latour & Law in the late 1980s (Latour 2007) and *The Network Society*, by M. Castells in 1996. It is important to understand that there are border notions to the concept of *network* such as *partnership* and *collaboration* that probably correspond to the most common usages of the term. However, more precise concepts need to be confronted from the contributions above.

Firstly, we can look at *Actor Network Theory* that does not claim to constitute a social theory. It sees itself with a more modest status. It aims to understand how agents come and manage to hold together even temporarily and how able they are to exert influence upon each other within the network. This 'theory' also examines how members connect - or fail to connect -

and the changes they manage to introduce in network activities. For this reason, entities involved in networking are characterized by the multiplicity and the tensions in their connections. Secondly, the contribution of Castells' *Network Society Theory* claims to be a theory of the social because it focuses on the new social morphology of societies, networks, as a set of interconnected nodes. Moreover, as Castells stresses, networks have the capability to expand,: "Networks are open structures able to expand without limits, integrating new nodes as long as they are able to communicate within the network" (Castells 1996: 501).

These contributions are relevant to understand the way in which this research is guided. They allow the establishment of a framework to accommodate the policy emphasis on the school relationship with local organizations and associations, as well as groups of residents, which might be related through both formal and informal networks. This is perceived as stimuli to educate children and young people in more open ways and new forms of identity construction, of knowledge and sociability building that arises from the matching up of school with other non-formal contexts.

Although some authors see the emphasis on the relationship between schools and local communities as a confirmation that knowledge is escaping from school while locating itself in different contexts and places, other researchers, such as Barroso (2005), analyse the shortcomings and dangers of local "micro-regulation" which might be too much compromised with different stakeholders' interests and also subjected to difficult negotiations. The view adopted here is somewhat different: it attempts to understand the new logics of action concerning the role of local organisations in the face of the multifaceted problem that school failure encompasses and the array of

problems that plague urban, rural and suburban areas as a consequence of the rates of student dropout and underachievement.

2. Notes on methodology

The methodological approach is based on content analysis of interviews conducted with key actors on local education policies. These interviews aimed to understand the discourses, strategies and practices they pursue, concerning school performance. In this methodological path, it is necessary to clarify the uses of the concept of *discourse*. It will follow Ball's view that "power is invested in discourse and practices produce, maintain or develop power relations, namely in the establishment of 'truth' on the knowledge on education, its role and social functions" (Ball 1990: 2). In this sense, local decision-makers' discourses are not neutral, and they position themselves in the context of power relations and social change.

The interviews of education councillors aim at understanding the ways in which these politicians perceive education at both the local and national level. The open interview guide was organised along five main items: 1) diagnosis of the problems of the municipality in general and of education in particular; 2) guidelines and activities of local educational policies; 3) networking; 4) evaluation; 5) future perspectives for education².

The municipalities, where the interviews took place, were selected according to criteria such as the higher rates of school dropout or/and the adoption of 'best practices' to deal with it. Hence, there is an intentional sample that also took into account diverse criteria, like: geographical location (coastal/inland); land surface; population density; variation of population

² Interviews took place between January and September 2011.

rates.

Content analysis was based on the core structure of the interview guide, strongly related to the aims of the project, and from which it was possible to extract a first level of categories through the use of the software NVivo. Later, after consecutive readings, it was possible to build categories with greater interpretative character. If we consider Mason's classification (1996) of the possible approaches on interviews' analysis (literal, interpretative and reflexive), the interpretative approach was followed in the current research since it intended to make sense of the meanings attributed by education councillors to the problem of school achievement and was also able to contribute to an understanding of the process of writing in itself as part of the interpretation (Denzin 1998; Costa 2005)³.

A few districts where the interviews took place face poverty. This is the case of the River Tâmega Valley in the interior of Northern Portugal. Some years ago, this was one of the most economically depressed European areas enduring major problems of unemployment and school underachievement. Currently it experiences noticeable improvement in some sectors (in particular shoemaking), whereas other sectors have remained with economic and social problems. Out of the 25 municipalities, 14 are located in country's hinterland and 8 by the sea; 3 have small land area⁴ and high population density⁵. On the contrary, 6 of them have large land area⁶ and low population density⁷. Some municipalities correspond to large cities.

³ The Project *Building Local Networking in Education in Portugal?* is in the 2nd year. For this reason, the analysis of the interviews with 25 local authorities is still exploratory.

⁴ Under 85 Km²

⁵ More than 1.000 inhabitants per Km²

⁶ Between 250 and 760 Km²

⁷ Between 12 and 25 inhabitants per Km²

greater responsibilities in the way education is governed in different regions. Mainly, these competencies encompass limited levels of conception and planning of education and, mostly, the development and management of equipment and services as well as some support and collaboration towards school autonomy, easing up the means to accomplish their desirable goals of success.

Two main instruments of regulation were enacted in order to organise the way the education system would be decentralised by the local authorities. The last version is Law 7/2003, which includes the development of the *Municipal Council for Education* (CME) and the *Education Plan* that is established by each local authority. These instruments are meant to be strategic plans for the local development of education services and present a characterisation of schools. It includes their facilities, how they are clustered with others, as well as projects to develop new buildings or to close existing ones according to demographic changes and other needs, such as making the educational system less expensive to the central government. Other legal documents (Law 159/99 and 144/2008) specify the area of competences delegated by the state to local authorities to support schools, students and families.

There are limitations to the duties endorsed that are unevenly distributed among local municipalities, since they result from protocols that were negotiated and signed according to different political views and interests of each local authority. All municipalities accepted the responsibility for pre-schools and primary schools, some of which included grades 5 to 9. The provision of education consists of large array of responsibilities such as construction and maintenance of school buildings, employment of support staff (but not teachers), provision of pupils' transport, meals,

and support to families via extra-curricular activities. However, many of the municipalities exceed their legal competences, expanding their areas of intervention, working with the communities in pedagogical, social, and cultural projects.

As said above, the increased role played by local political, educational, and social actors to face the complexity of today's education problems is one of the main concerns of this research based on the analysis of local politicians' discourse and other empirical data. Their views on school achievement follow.

4. Local authorities' perspectives on school achievement

How central is school achievement in local authorities' discourses? How are school dropout and underachievement seen and analysed? How strong or weak are the ties of the both informal and formal networks that link school clusters and other institutions aiming to confront these problems? Are education local authorities revealing specific cautions regarding schools and teachers' management responsibilities, given the historical recent past?

Major categories can be addressed from the interpretation of the interviews. Family and the social *milieu* are the main concerns of the interviewees when they elaborate on the "causes" of school dropout and underachievement. This specific concept refers to the lack of accomplishment of the parameters established by teachers in the curriculum to consider pupils able to be accepted in the following school year.

4.1. School underachievement: family, local culture and context

This is one of the main categories established in this analysis. It includes the main emphasis that education councilors give to their perspectives towards school underachievement. The emphasis varies notoriously: for some, "family lack of involvement" is at the centre of their concerns; whereas for others, unsatisfactory pupils' results may be related to the teaching that tends to devalue local culture; and still for others the problem of school underachievement is associated to the social conditions of poverty and geographical isolation, especially the lack of easy access plays a key role. One of the interviewees is quite critical as to the "labyrinth" school norms and rules constitute for most people thus driving them away from their children' school. Taking into account the way in which the long tradition of studies in Sociology of Education has discussed power relations, one may say that the majority of interviewees does not discuss this issue. Any school appears as an institution that is taken for granted, and where teachers' competence and spheres of influence should not be questioned.

4.1.1. "School underachievement is due to families"

Others respondents stress local culture as an obstacle, devaluing education. This is connected to parents' functional illiteracy and low levels of schooling related to educational and vocational pathways quite distant from school, thus being unable to stimulate children in their school work. These interviewees refer to "difficult stories" regarding schooling:

I think that this is related to the local culture, with family low involvement in school. Parents are illiterate, at least functionally; they do not have a disposition to help children. (P-AV5)

The socio-cultural context is not favourable to school. Schooling is devalued. Parents do not impel children to the idea that studying is important. There is not a clear interest for school activities. Parents have low school qualifications. (VR-AVT1)

The socio-geographical living conditions also worry the education councilors of some municipalities with problems of accessibility. They work with schools to provide better learning conditions and transports for those who live in the farthest places with difficult roads:

The major difficulties are lived by children from the most isolated places in the mountain and where everything is more difficult. The first child enters the school bus at 5.40 am. She sleeps all the time until arriving at school at 8am. When she returns home at 5.30pm she also sleeps all the way long. (P-AV5)

The perspectives expressed by the interviewees concerning school underachievement accentuate mainly family problems or the socio-geographical situation in which pupils live. It is a quite classic view that it is voiced, sometimes even stereotyped. The devaluation of local culture by schools is hardly addressed as other aspects that could constitute a more systematic focus on the complex relationships and difficulties in school education to overcome the situation in analysis.

4.2. "People believe in schools"

It should be stressed that either the same or other interviewees may underline, however, other opinions.

Particularly, the way in which school is seen as a provider of social change, both in terms of ameliorating local children living conditions and social mobility. The emphasis is on how social processes in the country are changing quickly:

This is a district where people believe in schools. These have a good image. People believe that, via schooling, they will achieve better social conditions. There are young people returning to school after dropout and they still think that school is a good place to stay. (P-AV7)

I see that all families are interested in school. Besides, the fact that here there is no school dropout is related to this interest. This is a population with lots of faith in school education. Parents' attitudes go beyond my expectations. Many have completed the 9th year⁸. Many want to follow to the 6th form, which is really more difficult. They are true believers in school as an instrument of social mobility and the betterment of social conditions. (L-AV1)

These respondents appear to have contrasting views compared to those just mentioned above. In these cases, the interviewees do not say that the school is devalued; it is seen as a social mobility facilitator. They appear to argue that local people perceive education as a right to greater social, cultural and economic development. Are these the views of those living in the more urban and industrialised regions, whereas the previous councilors expressed the views of the residents of the inner country, with more illiterate population? It is difficult to answer this question within the framework of this chapter and the data selected to support it. It is necessary to retain that councilors are interpreting the views of their constituencies and not presenting any data that

⁸ At the time of data collection, the compulsory school was of 9 years. It has changed recently to 12 years.

confirm or infirm their views. In the late 1980s, those living in rural and semirural areas were not always very positive about the value of their children attending school after they were 12 or 14. Many were in need of children for economic survival (see Stoer & Araújo 2000). Twenty years later the perception of the role of school education is quite different. It may be that more urban populations are less believers (than rural ones) on the power of school for their children in the midst of the economic turmoil and crisis lived in the country.

4.3. "School dropout is non-existent"

The 2006 and 2007 debates on school dropout and underachievement were most audible in the country. The focus was on the high rates that Portugal presented when compared to other countries in the European Union. Policies were developed to confront this problem, as already mentioned.

Several interviewees stressed that school dropout stopped being a problem in their districts. They acknowledge the impact of the policies that were developed in attaining the expected outcomes. The answers were quick as something that is no more the concern of these local authorities. More relevant issues emerge nowadays.

School dropout does not exist in the 1st and 2nd cycles and it is residual in the 3rd cycle, due to several educational policies. (P-AV2)

School dropout is non-existent. Our school cluster has a dynamic director and a team that promotes several educational offers. (VR-AV3)

There is no school dropout now because we have vocational courses (CEF, EFA⁹) that are attracting young people as well as other projects ("Incluir", PIEC's) all of these contribute to their staying in school until the 6th form or until 18 years old. (P-AV8)

School dropout is presented as related to specific ethnic groups. Roma, African or Asian pupils are mentioned as more prone to dropout from schools:

Most commonly, school dropout is from young people from PALOP¹⁰ countries. (L-AV3)

We had a situation with gypsy girls. They were dropping out because their parents did not allow them the use of public transport. Therefore, we decided to get them some special circuits by car: they come to school by taxi. In fact, this is expensive. But we have the expectation that they will be successful and that the new generation will be already prepared to use public transports as other people. (P-AV7)

It is necessary to stress the tensions that these words bring to this collective position: ethnic minorities or "foreigners" school dropout is apparently devalued,

⁹ EFA - Adult Education and Training courses aimed at citizens aged 18 and over, who are not qualified or are improperly qualified for the insertion in the labour market and who have not completed four, six or nine years of primary education (1083/2000).

CEF - Education and Training Courses aimed primarily at young people aged 15 years or more, who are at risk of leaving school or who have dropped out before completion of 12 years of schooling. It also applies to those who completed 12 years of schooling, without attaining professional qualification, and wish to obtain it for entry into the world of work. These courses provide qualifications at level 1, 2 and 3 (EQF - European Qualifications Framework), which give equivalence to years 6, 9 and 12 respectively (453/2004).

¹⁰ PALOP (*Países Africanos de Língua Oficial Portuguesa*) **This acronym refers to African countries whose official language is Portuguese.**

something that does not appear as an important concern. As mentioned above, one education councilor mentioned a specific measure addressed at Roma girls. However, it is possible to get the impression that their school dropout is not generally perceived as a central problem.

4.4. "We have to give opportunities and vocational courses may constitute a stimulus to those pupils who are not interested in school"

Several interviewees underline the relevance of vocational courses for children that are not successful in schools. Some are more emphatic on the support that these courses will contribute to overcome the problem of school underachievement. Their orientation is to create new vocational courses with the contribution of different institutions.

In our district we have schools with good vocational training. When we ask these young people what they want to follow, they answer is always: computers. Usually we argue that there are better solutions with better prospects of employment: you know, there are already too many people in computers. We have good factories, you can earn lots of money as a plumber. They usually answer: I do not like that. Then we insist to obtain their acceptance, we have to motivate them... Here, We also have jobs in restaurants. (P-AV6)

We have to give opportunities and vocational courses that may constitute a stimulus to those pupils who are not interested in school. They can obtain skills and then go to the labour market to be competent workers. We have a project called Twelve-Fifteen, a vocational course for those children who want to leave school. It is a School of Work Occupations (Escola das Profissões),

where they can develop basic competencies and later on they can return to school. (L-AV5)

We have a vast vocational offer and we are working with schools' management bodies so that these vocational courses become more adapted to the different school publics. We have Hairdresser and Beautician courses, promoted by the Town Hall. (L-AV3)

With the April Revolution (1974), Portugal adopted the comprehensive system and vocational schools disappeared for children in school age (6 to 14 at the time). Later, vocational courses (but not vocational schools) were reintroduced as "alternative" schools with equivalence to regular courses. Nowadays there is variety of offer. It is likely that some interviewees have in mind the former offer of vocational schools. The manual labour market and courses associated are seen as the most "natural" solution for pupils with low engagement in school. In general, many of these courses have low status and low salaries. This relationship with the labour market and with the concern of young people's insertion in work laden courses is strongly related to social class in the Portuguese stratified society.

4.5. "We respect very much the autonomy of schools"

In general, the interviewees in their role as education councilors are quite cautious when referring to their appreciation of local schools' work and quality. Some of the interviewees are former teachers and now education councilors in the Town Hall. There is clear concern not to invade what can be considered as teachers' territories and competencies. Education councilors want to preserve a climate of confidence, overcoming teachers' possible fear of local authorities, of being subsumed to local interests and powerful stakeholders and that their professional activities lose

its meaning and autonomy. Some clarifications are advanced but this is not an easy matter to approach in a sole interview:

We do not have interference at the level of school lessons, we do not advise at any point. (P-AV7)

We follow it closely but are not intrusive within school - to Caesar what is Caesar's - and really respect school autonomy and our perspective is that it should extend and the school should make its way. Our position is not really to direct or control what is done in terms of education. This is a jurisdiction that belongs to school, to the technicians who are there, they are all experts. (L-AV1)

These councilors are more explicit than others and this question sounds like something that needs careful attention. Education councilors in general produce positive evaluations of the work that schools and school clusters are pursuing regarding for instance school achievement or the quality of the teaching body. Others are able to express more critically their expectations of teachers in schools:

A teacher's work needs to be above his/her personal interest. Also teachers cannot come to the classroom and present contents quickly without pedagogical concerns, without understanding the social reality in which the school is inserted. They need to understand the pupil context. (P-AV5)

At this moment, some of the school underachievement is due to inadequate teacher training. It is necessary to stimulate pupils. We cannot say that the problem lies only in that pupils do not want to study. The problem is not

only the pupils. Teachers need to present education contents and activities in an attractive way, pupils would be much more interested. The problem is also the lack of pedagogical methods and strategies. (VR-AV2)

I am in the General Council (in the local schools' cluster) and these issues are debated there. I know the view of the school: pupils are not interested, parents are not interested, pupils do not study... These are the current justifications. However, I do not agree! (L-AV1)

There is here a clear tension. The general evaluation of teachers' work in schools appears not to be homogeneous: some education councilors are careful in praising teachers work quality, may be because they feel their former identity being questioned; but others are more critical not very convinced of the quality of teacher training or of their clear involvement with lower achieving pupils. There is also a frequently voiced concern not to be intrusive in what is considered the teacher's proper professional space.

4.6. The Town Hall is developing social policies that contribute to school achievement

Almost all interviewees accentuate their involvement in providing the best conditions for school achievement.

The Town Hall is doing what it should do: to create conditions in order to have better school achievement and people with more qualifications. I am referring to the measures that contribute to school achievement. (P-AV2)

We are partners with PIEC¹¹, with CPCJ¹², we are partners of the Project "Incluir" (Pro Inclusion), with the Program "Escolhas" (Choices) to

¹¹ PIEC - Program for Inclusion and Citizenship.

¹² CPCJ - Commission for Children and Young People Protection.

confront school underachievement. We are partners of several projects. I think that the Town Hall is here to help, to confront school underachievement. (P-AV8)

The Town Hall is developing social policies that contribute to school achievement. For instance, it is involved in the betterment of housing facilities and this is a contribution to better conditions for children schooling. (VR-AVT1)

Now with the new School Centers (clusters) and secondary school, with the contribution of CPCJ and Social Network, school dropout has lowered as well as school underachievement. There has been a relationship of great complementarity between educational community and the Town Halls. (VR-AV6)

Given the educational guidelines of the central state, which clearly reinforced the role of local authorities in education, the local leaders express different perceptions. Many recall that their municipality is unique or has pioneered many actions to support education and that they go far beyond legal requirements. With some frequency, they state that the municipality did not wait for the legislative framework in order to plan and materialize actions of social support aimed at promoting school success and/or at combating school failure and dropout. The idea that education is not a cost but an investment still stands out. The majority of local leaders' discourses stress the idea of the complementary efforts among local authority, school and other social partners, to promote the social welfare which, in turn, is supposed to have a positive impact on education and on the general development of society. At the same time, the Town Hall should seek to meet the needs of the most disadvantaged, taking into account the promotion of balance and social justice.

To sum up

The central points that may be stressed are that in general these education councilors were able to emphasize their involvement in school achievement and in the betterment of social conditions. In the perspective of several interviewees, school dropout is non-existent, solely residual or marginal, unless for minority groups. The way they refer it, minority pupils appear devalued, as marginal to their concerns. Their urgency in presenting them as such supports the view of the success of national and local educational policies in such matter: vocational and other kinds of courses are receiving pupils with less than regular achievement¹³.

As far as school underachievement is concerned, several educational councilors appear to be clear about the importance of changing social conditions for better results in schools, as well as of the role that local authorities need to play to ameliorate social conditions of isolation, poverty and school difficult stories. In that sense, several are able to see themselves as playing an important mission in education and in the community, promoting education and cultural activities as well as giving support to activities that schools promote. However, some present the view of the deficit family that is absent or "dysfunctional".

The next section explores the processes behind the implementation of local collaborative policies and the resulting partnerships and governance networks for the provision of education at schools.

¹³ They are clearly referring the 9 years of compulsory schooling that was really the target. Only recently secondary school is announced to be compulsory until 18 years old. Therefore, they are not having in mind school drop-out regarding the 'secondary school' - the 10, 11 and 12 grades.

5. Are Local Authorities networking in Education?*

Aiming at understanding how Portuguese Municipalities face the challenges involved in implementing recent educational policies, and given the important role that these have to play in the process of school development, it is of great importance to know how partnerships are taking place, who is involved and cooperating, both individually or as organizations, in sharing resources, in facilitating information, in exchanging knowledge, that is, how networks are being built as mechanisms to support a still fragmented political agenda concerning the way education is, or should be, governed.

In the process of analysing how these networks are explained by the local educational officials, there was an effort to identify common features and processes to highlight the evidence of any kind of structure. Thus, drawing from Hadfield and Chapman (2009), four main conceptual dimensions were accounted for in the politicians' discourse: i) Purposes for networking; ii) Main actors; iii) Centrality of the networks (identifying the nodes); and iv) Relational dynamics.

1) The **purposes of networking** are expressed in three main directions: a) to build and develop networks expecting social responses from partners; b) to share resources; c) to maintain traditions. Most interviewees expect some contribution from the social networks to enhance the opportunities for children, young people and families in need. They look forward to concrete strategies and projects in order to solve societal and educational problems, as previously mentioned. As to sharing resources, it is closely related to the instrumental nature of networks in the sense that they constitute an element valued by local authorities to deliver services to schools. The third

purpose, associated to the maintenance of cultural and local traditions, is mainly visible in some municipalities with strong level of civic participation.

2) The **main actors** in establishing networks were gathered in two categories: collective/organizational actors and individual actors. The first are entities with public or private organizational structures, which are assumed by local authorities as “partners” in the network. The most relevant are the Private Institutions of Social Solidarity (IPSS).

Finding that the Municipalities with “leftwing” political affiliations seem to have larger diversity of network partners as compared to those closer to the “rightwing” was also interesting. Attending to the internal characteristics of the municipalities, it seems that most with higher population density interact with a larger number of actors. Lastly, it seems that local authorities prefer to establish direct partnerships with schools and neglect the opportunity of the School Council where they are represented. This may be interpreted as a difficulty to take direct part in the definition of school policies, and in favouring the traditional role as provider of resources.

Individual actors assume an important role in the network, mainly, the Education Municipal (political) Councillors, the Officials, and at school, the Director and the school Psychologist, among others.

3) Concerning the **Centrality of the Networks**, two major types were identified in the discourses: networks centralized in the municipality and networks formed in the social networks “fabricated” by the state. The first type of networks, with the local authority at the core, is the most prevalent in the discourses. It comes associated with leadership characteristics and initiative in coordination:

We are the core, the hub that makes all the mechanism work. In fact, someone has to lead the process; we know that, by itself, a network cannot survive. A group of partners needs someone to lead or at least to pull, trying to put the pieces of the puzzle together. Sometimes it takes only one who doesn't fit to stop everything... (P-AV1)

I think that partners cooperate when we inform them about the problems, the needs. They are available to collaborate, of course not as much as we would like, but in general they are available... (L-AV5)

Networks with an implicit centre at the partner institutions fabricated by the state such as the *Local Councils for Education* (CME); *Local Social Welfare Council*; *Commission for Children and Young People Protection*, on the one hand, discuss problems with a social educational nature. On the other hand, they promote an effective implementation of the projects in their search for problem solving. In this case, local authorities accept the responsibility to pursue those aims.

Most local authorities, municipalities of the inner country, value the formal participation at the CME (Municipal Council for Education) where local representatives share their concerns, present ideas or strategies, that are very healthy for the relationships among all, allowing for articulation and networking. (VR-AV2)

The CMEs (Municipal Council for Education) are sources of controversy. Legislation is not clear. Therefore, the main roles that were ascribed as coordinators or consultants towards/for the promotion of education and cultural endeavours are open to different interpretations by local authorities, as shown in Table 1.

Table 1. The role of the CMEs.

Centrality of the Networks
The role of the local authorities in the Municipal Educational Councils (CME)

Centrality of the Networks	
<p>Centrality of the CME in the development of local networks: When the local authorities accept the political competencies of the CME and seem less active in the coordination and regulation of the</p> <p><i>•First, the articulation is done at the CME and afterwards, it proceeds but, that is what the organism is supposed to do, to articulate ” (VR-AV5 < ref 2)</i></p>	<p>Descentralisation of the CME in the development of local networks: Some Councillors seem defensive in relation to the competencies of the CME. In this case, they tend to show a stronger antagonism in the regulation of the networks</p> <p><i>“The CME existes, it works and and follows what the law says that has to be done. However, it is a law, maybe irrelevant, sometimes perverse also...” (L-AV2 < ref 5)</i></p>

4) **Relational Dynamics** observed in the analysis of the discourses of these education councilors are mainly characterised as collaborative work, which is considered essential for the sustainability of networks. Also important is the definition of common objectives and roles, the division of tasks and participation of all.

This is important because it makes it easier if everybody helps to accomplish the activities. If only some are thinking and trying to solve the problems and others do not... if we all help it makes it viable to attain our objectives. (P-AV3)

Good relationships are a positive element for these politicians when they characterise networks. They also stress the need for proximity and strong links to foster the success of networks:

I would like to add that things are working out because there is a good relationship, even personal, among us. (P-AV3)

Thus, it is this trust, the institutional solidarity and proximity that describe the work of our

municipality. I, honestly, may say that I do not skip a week without being with school directors, in fact, tomorrow I am going to be with... (L-AV3)

People (individual and collective) involvement in local networks is also stressed by the councilors:

I mean, we have this relationship and we may say that there is this openness by all entities because they know they can trust us, and thus happily, there hasn't been any major problem with the education agents. It is this involvement of everybody, including teachers, though there were some problems at the beginning, which we may say that we can see some results... (P-AV3)

Local authority leadership is considered the main mechanism for the emergence and consolidation of networks:

we network with all institutions in this territory, social solidarity institutions, mostly, for children transport, provision of meals, and supporting the family. We establish contracts with these institutions but we monitor and follow their tasks... (P-AV5)

To sum up, it may be stressed that local networks are developing platforms to facilitate cooperation, providing for resources and challenging the hard economic times. Some already assume formal dispositions, mostly, centered in the CME. Others are developing more informally, to respond to schools needs or to enforce the formal ones. In any case, local authorities value the important role they play in improving the quality of education and school conditions that are needed for the success of all pupils.

At this stage of the project, it is possible to conclude that local authorities are responding to the current

political agenda and thus, directing their social intervention in a more structured way, defining their objectives and roles in relation to their partnerships. This is evident in detecting cases of family poverty and school dropout. As for the consistency of the intervention in education, their participation is still fragmented, without a strategic plan or clear goals to be attained. This seems to happen due to the very slow process of central government decentralisation and the unclear roles of institutions in developing collective action towards the promotion of school success.

With some exceptions, local politicians' discourses show a mosaic of partnership activities not yet formally integrated in local networks aimed at enhancing school success. Clearly, the existing dimensions of intervention at local level favour the socio-educative projects. However, it is mostly an instrumental response focused in the availability of resources and not targeted at the pedagogical ends of schooling. The process of delegation of competencies to local authorities in matters of education, historically state centered, is still in progress, loosely articulated and with unstable pace, and in urgent need of definition and maturation.

Conclusions

This chapter documents the range of influences on decision-making in schools, and contributes to understand how such influence varies by local contextual factors, departing from two pivotal questions: how do local authorities perceive the importance of their action on education concerning school dropout? How do they define their strategies in local networking? Local authorities' different perspectives emerge in the understandings of their

relationship with schools in the face of school dropout and underachievement and in the ways they plan and pursue the activities on the basis of local networking importance. The ways in which they position themselves for the construction of an extended democracy and perceive school education as social right is at the core of their differences. More than presenting autarchy programs on educational policies that deepen the enshrined legal framework, local authorities seem to devote more attention to their direct or indirect role of action in favour of educational success. However, the social sphere seems to be privileged, as a sign of the relevance that action and social action in particular, has in the educational policy of the municipality.

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CHAPTER 7

SCHOOL ACHIEVEMENT IN URBAN AND RURAL AREAS IN CROATIA: IS THE QUALITY OF EDUCATION EQUAL FOR ALL?

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Abstract

Equality in education is an important issue in the educational policies of the majority of world countries. A common aspiration is to ensure equal opportunities for a quality education to all individuals and social groups. However, countries differ in how successful they are in accomplishing this goal, as reflected in the equality of the educational outcomes.

In this chapter, the results of an empirical study examining the educational outcomes in primary schools located in different parts of Croatia are presented, using the comprehensive data collected in a national examination. The educational achievements in the majority of subjects covered by the curriculum are examined in approximately

100,000 fourth and eighth grade students attending all of 844 primary schools in Croatia. The results show that significant differences in achievement exist between schools located in urban and rural areas, and that the schools located in the more socioeconomically developed areas are significantly more successful than schools in more deprived areas.

The study clearly points to currently unequal opportunities in different schools within the Croatian primary education system. Recommendations for systematic interventions aimed at minimizing the inequalities in the educational opportunities derived from socioeconomic deprivation are outlined.

Keywords

urban-rural differences – school achievement –
socioeconomic development

Introduction

In the majority of countries and educational systems, the paramount goal of policy makers is to provide equal educational opportunities for all. However, in practice, this is rarely accomplished. Even when the equal opportunities are assured, they rarely result in equal achievement, which leads to the belief that it is impossible to ensure both equality and quality in the school context, at least concurrently (Smith & Lusthaus, 1995). Hence, the important research questions are what can be done to minimize the present inequalities and their potential consequences, and to improve the quality of education. Besides the inequalities in educational access and in the attained quality observed between countries in international comparisons, it is also important to identify the circumstances within individual countries and to recognize the specific factors that contribute to inequalities. In this chapter, we focus on the Croatian educational system, with the aim to determine to what

extent the policy of equality proclaimed in the Constitution is realized in the actual achievement of schools, as an important educational outcome. Specifically, the aim is to examine the within-country differences in school achievement which may arise from differences at the level of urbanization and socioeconomic development of various parts of the country. In the first part of the chapter, we briefly describe the organization, structure and key issues in the Croatian educational system. Next, we provide a short overview of different international studies that have examined the differences in achievement between urban and rural schools. Finally, the results of an empirical study examining the differences in school achievement between schools from municipalities of different levels of urbanization and socioeconomic development are presented and discussed.

1. An Overview of the Croatian Educational System

The organization of the Croatian educational system is similar to that in the majority of European and world countries – it consists of preschool, primary school, and different types of secondary and tertiary education. In a certain way, primary education has a special position: it is stated in the Constitution that it is compulsory and free of charge for all children, and the school dropout rate, as well as the progression of students to secondary school, and consequently to tertiary education, is largely determined by their achievement during primary schooling. The primary education is realized through a network of primary schools, which are for the most part under the administrative control of national and local authorities, although they also have certain internal control mechanisms.

Currently there are 844 primary schools in Croatia in which the regular school program is implemented. In addition, there is a certain number of specialized primary schools, with various special educational programs, mainly those intended for children with special educational needs (Law on Education in Primary and Secondary Schools, NN 87/2008). There are currently approximately 400,000 students attending primary schools.

The school entrance practice is based on the single annual intake of students to a school, and children are enrolled in the first grade of primary school if they turn six years of age by April 1st of the current calendar year. It is compulsory to complete eight grades of primary school. Hence, students are aged 14 or 15 when they finish primary schooling, assuming they were not accelerated or retained in grades. The primary criterion for student enrollment in secondary school is their school achievement in the final two grades of primary school. In the first four grades of primary school the so called "class teaching" is practiced, whereby all the students in a class have a single class teacher who teaches all the curriculum subjects, except foreign languages. In the remaining four grades "subject teaching" is practiced, and students have multiple teachers, each teaching the subject(s) he/she is specialized for.

An important social change which took place in Croatia at the end of the 20th century was the transition from socialism to democracy. Consequently, the Croatian educational system was faced with numerous challenges and much needed reforms. During the last decade, various changes were introduced. They were of different scope and complexity, and were generally focused on diverse goals: (a) to raise the quality of education in general, as well as the quality on each of the existing levels; (b) to develop an efficient and

effective educational system, and (c) to develop a fair educational system, which will provide equal opportunities for all students. The changes that have already been taken, and the ones planned for the future, are all intended to ensure the development of a modern educational system, which will be able to adequately respond to challenges that Croatian society is facing in the context of joining the European Union. Likewise, the educational system should deal with the challenge of creating a workforce that can appropriately respond and adapt to the changing needs of the labor market and ensure that each individual gains knowledge and competencies that make him/her competitive in the modern knowledge-based economies.

In Croatia, equal access to education for all is a constitutional right. However, various factors may affect the quality of educational opportunities available to an individual. One such factor which may be particularly salient in Croatian society is the pronounced within-country differences in the level of urbanization and socioeconomic development. In order to adequately assess and monitor these differences, the governmental institutions have even created a quantitative index, named the Index of Development, (Law on Regional Development, NN 153/09, Act on the Index of Development, NN 63/2010). The economic differences, as well as the differences in the access to services and goods between different parts of the country are frequently considered and discussed, but empirical research on differences in the quality of education and educational achievements are scarce. This is problematic because these differences are the possible source from which all the other differences between members of any society originate (United Nations Development Programme [UNDP], 2007). Additionally, the problem of equal access to quality

education can be considered as a broader social policy issue. In the neighboring Slovenia, which is, with respect to different socioeconomic, historical and developmental characteristics similar to Croatia, a lively debate occurred recently on the issue whether the pronounced differences in average achievement of students from different parts of the country found in a comprehensive examination of educational achievements are an example of basic human rights violation (Ivelja, 2009). This debate has escalated to an extent that even the Slovenian human rights ombudsman was involved. In the next part of the chapter, we hence turn to international studies that have examined the differences in school achievement between urban and rural schools.

2. Differences in Achievement between Urban and Rural Schools

Empirical studies conducted in various countries have revealed differences in school achievement between certain territorial units and stable differences between certain social groups. In the majority of studies, the basic dimension by which these differences can be explained is the difference between urban and rural areas (Brasington, 2002; Pink & Noblit, 2007). The findings generally indicate that schools from urban communities are more successful than those from rural communities. Students from urban schools have better achievement on standardized knowledge tests (Organization for Economic Co-operation and Development [OECD], 2010; Young, 1998), lower school dropout rates (Rumberger & Thomas, 2000) and higher educational aspirations (MacBrayne, 1987; McCracken & Barcinas, 1991). Urban schools are also better equipped (Condron & Roscigno, 2003; Randhawa & Michayluk, 1975) and the quality of teaching is generally better in urban than in rural schools (Lowe, 2006; Monk 2007; Prince, 2002). This pattern of greater success of urban schools, when

compared to rural schools, is replicated in different countries. For example, it was observed when urban and rural schools were compared in Australia (Australian Council for Educational Research [ACER], 2002; Pegg & Panizzon, 2007), Canada (Canadian Council on Learning [CCL], 2006), Sub-Saharan Africa (Zhang, 2006), Latvia (Geske, Grinfelds, Dedze, & Zhang, 2006), as well in the neighboring Slovenia (Zakelj et al., 2009), and in large-scale international studies (OECD, 2010). It is important to note that, as well as in school achievement, the differences were also observed in other areas of student school life (e.g. Stern, 1994).

Studies that have examined the differences in school achievement between urban and rural schools show that they are evident in the majority of school subjects. Students from urban schools outperform those from rural schools in mathematics (Young, 1998) and in literacy (Cartwright & Allen, 2002; Pegg & Panizzon, 2007; Weir, Archer, & Millar, 2009). However, the observed urban-rural differences are not completely unequivocal. For example, Lee and McIntire (2000) studied in more detail the differences in achievement in mathematics between students from urban and rural schools. They did not find significant differences at the national level, but in some geographic regions of the country students from urban communities outperformed those from rural communities, while in other regions the differences were in the opposite direction, and in some regions they were not significant. The authors attributed the observed differences to the variable conditions in the schools, primarily to how good the schools were equipped. Furthermore, some studies show that students from rural communities perform equally well in reading, mathematics and social sciences as their peers from urban communities, when some student

characteristics are controlled. In a comprehensive national longitudinal study conducted by Fan and Chen (1999), achievement in reading, mathematics, science and social studies of urban, suburban and rural students was compared, adjusting for socioeconomic status and taking into account ethnicity, geographic location, and the public-private schools distinction. The results showed that students from rural schools performed equally well as their urban and suburban counterparts, or even outperformed them. Similar results were obtained in other studies as well (e.g. Beck & Shoffstal, 2005; Randhawa & Hundt 1987; Reeves & Bylund, 2005).

These inconsistencies in findings from different studies are primarily explained by methodological reasons. The first such reason is inadequate territorial sampling. In the majority of studies, small and convenient territorial samples at narrow local levels were used, which often resulted in overemphasizing of specific, local social influences that are not necessarily present when comparisons are made at the national level. Furthermore, the urban-rural distinction is often poorly operationalized and in various studies different economic, social and developmental criteria are used to define urban and rural communities. In some studies the major criterion is the school size, in others it is the population size of the community in which the school is located, etc. (e.g. Edington & Koehler, 1987; Khattri, Riley, & Kane, 1997; McCracken & Barcinas, 1991; Frasko & Frasko, 1998). Finally, the potential mediators of the effects of the level of urbanization on achievement are insufficiently considered. At the student level, important characteristics such as the socioeconomic status of the student's family are often neglected (Khattri et al., 1997), and at the school level the different characteristics that may determine basic work conditions in the school are usually not considered.

The Empirical Study of the Differences in School Achievement between Urban and Rural Schools in Croatia

It is obvious that the researchers and the scientific community have extensively examined the question whether differences exist in school achievement between urban and rural schools. However, this question should also be intriguing and important to the community at large and to policy makers. Although the findings of different studies are somewhat inconsistent, there is enough evidence to cast a reasonable doubt that the educational reality is not in line with the proclaimed policy of stakeholders in the educational system about the equal quality of education for all.

In Croatia, although the differences between urban and rural areas are generally recognized, and they are very pronounced in socioeconomic development, the differences in achievement between rural and urban schools have not been systematically investigated. An interesting question is whether the observed trend that the urban areas are in a more favorable position according to their level of socioeconomic development will produce differences in the field of academic achievement as well. Only recently a comprehensive national examination was conducted in primary schools, which provides the opportunity to compare the achievement of urban and rural schools at a national level. The national primary schools examination provides sufficient empirical data to determine whether the differences in educational achievement between urban and rural schools exist and how pronounced they are in different subjects and at different stages of primary schooling.

1. Data

In order to empirically explore the relation between the level of urbanization and socioeconomic development and the achievement of schools, we used the data collected in the national examination conducted in all of the 844 Croatian primary schools at the end of the school year 2007.-2008. A total of 48,232 fourth and 46,196 eighth grade students participated in the examination (Burusic, Babarovic, & Sakic, 2008). Students completed objective "paper and pencil" tests assessing their knowledge, skills and competencies in the majority of subjects covered by the curriculum for respective grades. The fourth grade students completed tests in Croatian language, English language (as a foreign language), Mathematics, and Nature and society¹. In the eighth grade, approximately half of the students completed tests in Croatian language, Physics, Chemistry and Biology, while the other half of the students completed tests in English language (as a foreign language), Geography and History. The allocation of students in these two groups was conducted by the random sampling procedure. All the tests showed good psychometric properties (Babarovic, Burusic, & Sakic, 2009; Burusic, Babarovic, & Sakic, 2008, 2009). They had a clear single-factor structure, with almost all the items highly saturated by the first principal component. The reliability of the tests was good, with Cronbach alphas ranging from .64 to .89 in the fourth grade sample, and from .64 to .87 in the eighth grade sample.

2. Measures

School achievement. The school achievement in the examined school subjects in the fourth and eighth grade was operationalized through the National School

¹ The content of this subject largely corresponds to that covered in Science.

Achievement Comparability Index (NSACI), in which the average achievement of each school is considered in relation to the national average. The NSACIs were determined by firstly calculating the average score of the school on each test used in the examination in the fourth and eighth grades. Next, the national average was determined for each of the tests. The NSACI for each school was then calculated by dividing the school average on the test with the corresponding national average and multiplying the result by 100: $\text{school average}/\text{corresponding national average} \times 100$. A value of the NSACI greater than 100 shows that the achievement of the school in the respective subject is above the national average, while a value of the NSACI smaller than 100 shows that it is below the national average. The numerical difference in relation to 100 shows exactly how much the school average differs from the national average. The NSACIs are calculated for each of the examined subjects, as well as for the pooled knowledge test results. The pooled test results were calculated as the average of the standardized test scores (z-scores) for each school, and then transformed into the NSACI by the procedure explained above. The NSACI of the pooled knowledge test results can be interpreted as the achievement of the school in all school subjects taken together in comparison to the corresponding national average.

Level of urbanization. Based on the level of urbanization of the municipality in which the school is located, each school was assigned to one of the four categories: (1) completely urban, (2) predominantly urban, (3) predominantly rural, and (4) completely rural. These categories are based on the index of urbanization, calculated as an indicator of the proportion of town population in the total population of the municipality (Vresk, 1992). The basis for the calculation of the index is census data obtained from

the Croatian Bureau of Statistics. Although this index is focused primarily on the geo-demographic aspects of the urbanization level, research shows that it is a useful measure in territorial classification in Croatia (Rimac, Rihtar, & Oliveira-Roca, 1992).

Index of development. In order to examine the urban-rural differences in more detail, an additional indicator of the urbanization level was used, which is primarily based on the socioeconomic development of the municipalities – the official governmental Index of Development (Law on Regional Development, NN 153/09, Act on the Index of Development, NN 63/2010). In the calculation of the Index of Development for each city and municipality, the following data are taken into account: (1) unemployment rate, (2) income per capita, (3) the budget income of local and regional self-government unit per capita, (4) general demographic dynamics, and (5) educational structure. Based on the value of the Index, each city and municipality is placed in one of the following categories of development in relation to the national level: (1) less than 50%; (2) between 50% and 75%; (3) between 75% and 100%; (4) between 100% and 125%, and (5) above 125%. Based on its location, each school is placed in one of the five developmental categories.

3. Results

To examine the differences in achievement in the middle (fourth) and final (eighth) grade of primary school between schools in municipalities of different levels of urbanization, a series of one-way analyses of variance were performed. The results of these analyses in the fourth grade are shown in Table 1. In the fourth grade, significant differences in average achievement between schools in municipalities of different urbanization levels are observed in all of the examined curriculum subjects (Table 1).

Table 1. The comparison of average achievement in curriculum subjects between schools in municipalities with different levels of urbanization in the fourth grade

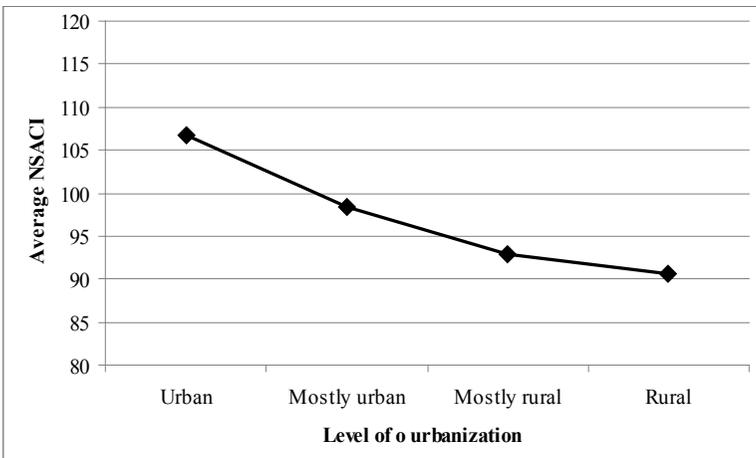
	Level of urbanization				F	p	η^2	
	Completely urban	Mostly urban	Mostly rural	Completely rural				
Croatian language	N	379	192	153	119	51,04	,000	,154
	M	105,14	99,13	94,37	92,27			
	sd	10,98	12,47	12,47	13,75			
English language	N	373	168	133	90	77,17	,000	,233
	M	110,43	94,59	89,58	85,53			
	sd	17,36	18,65	19,66	20,34			
Mathematics	N	379	193	153	119	29,87	,000	,096
	M	105,74	99,09	93,65	91,36			
	sd	15,33	17,85	18,81	21,81			
Nature and society	N	379	193	153	119	41,20	,000	,128
	M	104,77	99,71	94,25	92,68			
	sd	10,99	13,69	15,00	13,17			
Pooled knowledge test results	N	379	193	153	119	63,28	,000	,184
	M	106,79	98,37	92,96	90,63			
	sd	12,63	13,42	15,48	15,41			

On average, the achievement of schools decreases as the level of urbanization declines – schools in completely urban surroundings are the most successful and schools in completely rural surroundings are the least successful across all the subjects. As indicated by the values of eta-squared, approximately between 10% (Mathematics) and 23% (English language) of variance in achievement in specific subjects can be explained by differences in the level of urbanization of the school’s location. The percentage of variance in the general achievement of schools, based on the pooled knowledge test results, explained by the differences in the level of urbanization of the area in which the school is located is approximately 18%.

The average general achievement (measured by NCSAI) for schools in municipalities of different

urbanization level is shown in Figure 1. Schools in completely urban surroundings on average perform about 7% above the national average. The average achievement markedly decreases even in schools located in predominately urban surroundings – their average performance is 2% below the national average, while the performance of schools in rural surroundings is around 7 to 9% below the national average.

Figure 1. The average NSACI according to general achievement in schools from municipalities with different levels of urbanization (fourth grade)



In the eighth grade, significant differences in the average achievement of schools with respect to the level of urbanization are obtained only in Croatian language, English language, Physics and Geography, with average performance of schools in these subjects decreasing as the level of urbanization declines (Table 2).

However, the percentage of variance in achievement in specific subjects that can be explained by the differences in the level of urbanization is somewhat lower than in the fourth grade, ranging from 2% (Physics) to 15% (English language), and the

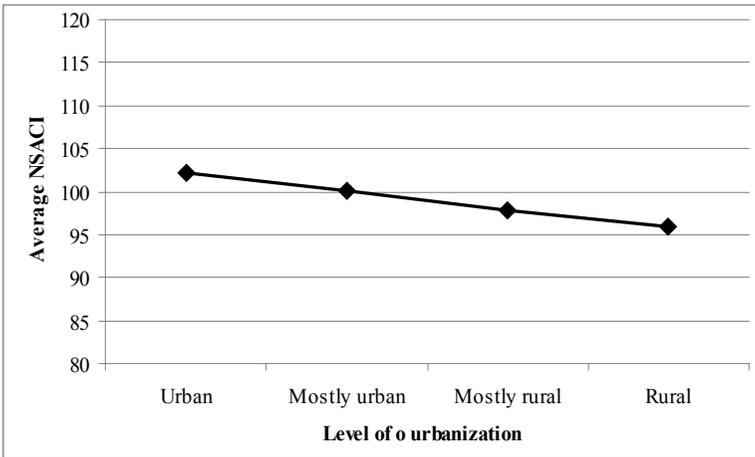
percentage of variance in general achievement of school explained by the urbanization level is only 2%.

Table 2. The comparison of average achievement in curriculum subjects between schools in municipalities with different levels of urbanization in the eighth grade

		Level of urbanization				F	p	η^2
		Completely urban	Mostly urban	Mostly rural	Completely rural			
Croatian language	N	376	179	149	115	13,67	,000	,048
	M	103,89	98,97	95,07	95,28			
	sd	16,29	16,47	18,01	19,66			
English language	N	363	144	110	62	40,82	,000	,154
	M	106,28	96,90	94,89	79,53			
	sd	17,39	20,00	19,93	24,14			
Physics	N	377	182	148	115	6,95	,000	,025
	M	102,13	101,87	95,68	95,61			
	sd	16,76	19,37	20,36	21,51			
Chemistry	N	377	182	148	115	1,47	,220	,005
	M	101,34	100,60	99,12	95,77			
	sd	23,57	26,48	29,38	26,18			
Biology	N	377	182	148	115	2,02	,109	,007
	M	101,86	99,76	97,58	97,41			
	sd	19,43	22,77	24,59	25,25			
Geography	N	363	180	145	109	3,87	,009	,014
	M	101,94	100,71	97,94	95,11			
	sd	16,09	22,60	22,96	23,24			
History	N	363	180	145	109	1,02	,383	,004
	M	101,21	99,14	99,51	98,03			
	sd	15,32	20,69	23,01	22,24			
Pooled knowledge test results	N	377	192	153	119	6,15	,000	,022
	M	102,12	100,18	97,74	95,87			
	sd	13,94	15,97	17,13	18,02			

The average general school achievement (NCSAI) also changes less markedly with the level of urbanization in the eighth than in the fourth grade (Figure 2). On average, schools perform close to the national average, with those in urban surroundings performing only slightly above and those in the rural surroundings somewhat below the national average.

Figure 2. The average NSACI according to general achievement in schools from municipalities with different levels of urbanization (eighth grade)



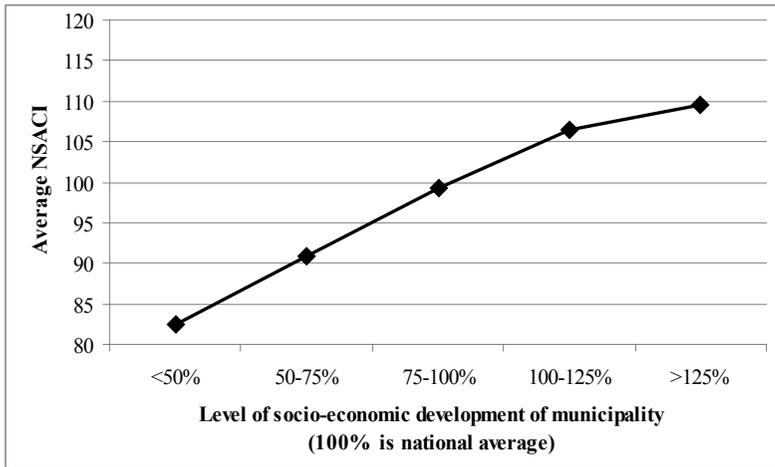
Next, a series of one-way analyses of variance were performed in order to examine the differences in achievement in the fourth and eighth grades between schools in municipalities of different level of socioeconomic development (Tables 3 and 4). In the fourth grade, significant differences in average achievement between schools in municipalities with different level of development were obtained in all the examined subjects (Table 3). The schools in the municipalities which are with respect to their socioeconomic development 50% below the national average were on average the least successful, while the schools in the most developed municipalities were the most successful. The differences in municipality's socioeconomic development level explained from 14% (Mathematics) to 33% (English language) of variance in achievement of schools in specific subjects. Overall, the differences in the level of a municipality's socioeconomic development explained 24% of variance in the general achievement of schools.

Table 3. The comparison of average achievement in curriculum subjects between schools in municipalities with different levels of socioeconomic development in the fourth grade

		Level of socioeconomic development of municipality (100% is the national average)					F	p	η^2
		<50%	50-75%	75-100%	100-125%	>125%			
Croatian language	N	28	205	268	213	129			
	M	85,77	93,01	99,74	104,50	107,33	48,49	,000	,188
	sd	12,93	11,32	11,00	12,44	12,70			
English language	N	23	168	246	202	125			
	M	76,16	84,72	96,57	111,26	115,81	94,48	,000	,332
	sd	19,54	15,87	17,84	17,97	15,95			
Mathematics	N	28	205	269	213	129			
	M	81,70	91,42	100,08	106,02	107,51	33,38	,000	,137
	sd	19,90	18,96	16,65	16,70	15,47			
Nature and society	N	28	205	269	213	129			
	M	84,94	93,34	99,41	104,38	107,84	44,90	,000	,176
	sd	16,26	12,82	11,47	12,90	11,71			
Pooled knowledge test results	N	28	205	269	213	129			
	M	82,49	90,93	99,26	106,45	109,61	65,28	,000	,237
	sd	15,47	13,42	12,61	14,12	12,78			

Schools from the least developed municipalities on average performed almost 20% below the national educational achievement average, and those in the municipalities which are 50% to 75% below the national developmental average performed 10% below the national educational average (Figure 3). The average achievement of schools in municipalities with the level of development closer to the national average (75-100%) was also close to the national educational average, and above average educational performance was observed in the schools located in the municipalities with above average level of development.

Figure 3. The average NSACI according to general achievement in schools from municipalities with different levels of socio-economic development (fourth grade)



Significant differences in educational achievement of schools from municipalities with different level of socioeconomic development are also observed in the eighth grade (Table 4). The differences are significant in all of the subjects, with the schools in the most developed municipalities showing the highest, and the schools in the least developed municipalities the lowest average educational achievement. The effect of municipality development on the educational achievement of schools is somewhat less pronounced than in the fourth grade. Differences in developmental level of the municipality explain between 2% (Biology) and 23% (English language) of variance in the educational achievement of schools in specific subjects.

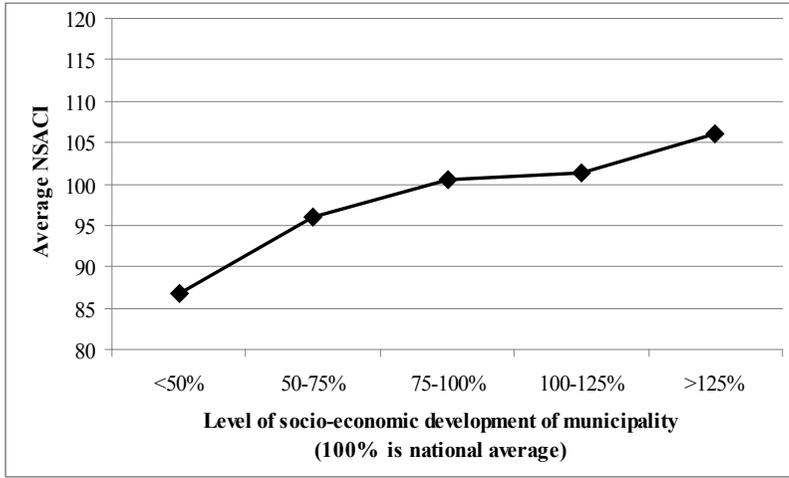
Table 4. The comparison of average achievement in curriculum subjects between schools in municipalities with different levels of socioeconomic development in the eighth grade

		Level of socioeconomic development of municipality (100% is the national average)					F	p	η^2
		<50%	50-75%	75-100%	100-125%	>125%			
Croatian language	N	28	198	261	204	128	19,64	,000	,088
	M	85,10	93,92	100,27	103,05	107,25			
	sd	20,44	18,57	15,32	16,29	16,75			
English language	N	19	136	208	195	121	51,98	,000	,236
	M	76,37	86,23	97,11	106,75	113,28			
	sd	30,72	21,52	16,79	15,52	17,59			
Physics	N	28	200	259	207	128	14,43	,000	,066
	M	86,01	94,07	101,03	102,25	106,61			
	sd	20,41	20,68	17,82	16,86	17,38			
Chemistry	N	28	200	259	207	128	4,76	,001	,023
	M	85,12	96,58	101,38	100,45	105,09			
	sd	19,09	28,10	24,75	23,96	26,35			
Biology	N	28	200	259	207	128	4,50	,001	,022
	M	93,16	96,07	101,07	99,97	105,54			
	sd	24,51	24,50	22,07	19,26	20,60			
Geography	N	24	192	259	200	122	9,21	,000	,044
	M	83,96	96,50	99,79	101,49	106,67			
	sd	29,12	22,42	19,68	17,80	16,05			
History	N	24	192	259	200	122	5,35	,000	,026
	M	85,26	98,00	100,11	101,66	103,09			
	sd	23,27	21,46	19,57	17,31	14,57			
Pooled knowledge test results	N	28	205	268	212	128	14,29	,000	,064
	M	86,85	95,94	100,57	101,24	106,09			
	sd	17,49	17,78	14,17	14,29	14,40			

The same pattern of educational differences between schools in differently socioeconomically developed municipalities is observed in the eighth grade (Figure 4) as in the fourth grade. The average educational achievement, measured by NSACI, is 4% to 14% below the national average in the schools located in the municipalities with below average socioeconomic development, it is equal to the national average in the municipalities of average development, and it is 1% to

6% above average in the more developed municipalities.

Figure 4. The average NSACI according to general achievement in schools from municipalities with different levels of socio-economic development (eighth grade)



4. Discussion

The results of this study are based on the data from an examination undertaken at the national level, which enables a comprehensive analysis of the differences in achievement between schools located in municipalities of different levels of urbanization. Additionally, the Index of Development used in the study enables the comparison of achievement of schools in municipalities of different levels of socioeconomic development, taking concurrently into account the differences in financial resources of the municipality as well as the sociodemographic characteristics of the population living in the area.

The results show that the achievement of schools is strongly related to the level of urbanization – schools located in urban areas are on average more successful than rural schools, with those in the completely urban

surroundings performing the best. These results are in line with the studies conducted in different countries and educational systems, which revealed that students in urban schools on average have a higher achievement on standardized knowledge tests than students in rural schools (e.g. Cartwright & Allen, 2002; Pegg & Panizzon, 2007; Weir, Archer, & Millar, 2009; Young, 1998).

Since the examination was undertaken in the fourth and eighth grades of primary school, this enables the comparison of the effects of the urbanization level at different stages of primary schooling. In the fourth grade, the differences in achievement between urban and rural schools are significant and salient across all the subjects. However, in the eighth grade the differences are much smaller and significant only in some subjects. As they are generally smaller in the eighth than in the fourth grade, it can be concluded that the level of urbanization overall contributes less to the explanation of differences in achievement between schools at the end of primary schooling than in the lower grades of primary school. One possible explanation of the observed pattern in the results is based on the organization of the work in schools and the characteristics of teaching which are to some extent specific for the Croatian educational system. As previously described, in the Croatian educational system, in the first four grades the so called "class teaching" is practiced, whereby students have a single teacher who teaches all the subjects. In Croatia, a considerable number of schools are located in completely or mostly rural areas, which are often poorly inhabited. In these schools, due to the small number of children and insufficient number of teachers, the teaching in the lower grades is frequently organized in the so called "mixed" classes. In these classes, children attending different grade

levels are placed in the same class and taught by a single teacher. This probably lowers the quality of teaching and adversely affects the achievement of students in rural areas, broadening the achievement gap between urban and rural schools in the lower grades of primary school.

The second possible explanation is more optimistic and follows the idea of equalizing the educational differences during the educational process. Principally, it is based on the effects of different family characteristics on student achievement and on the expectation that these characteristics are the most important predictor of educational achievement (e.g. Coleman et al., 1966; Ma & Wilkins, 2002; Rubin & Balow, 1979; Sutton & Soderstrom, 2001; White, 1982). Research conducted in Croatia also shows that student school achievement is strongly related to the socioeconomic status of the family, particularly to parental educational level (Babarovic et al., 2009; Burusic, Babarovic, & Markovic, 2010). In the European context, it is observed that the population in rural areas usually has a lower socioeconomic status (Copus et al., 2006; European Commission, 2008). It is possible that students in urban schools profit from the higher family socioeconomic status and higher parental educational level, since they are probably provided with more resources and their parents are better capable to become adequately involved in their education (e.g. Maynard & Howley, 1997). It is more likely that these factors are more present in the early stages of schooling, and the schools in rural communities are not able to minimize their influence in the lower grades. Our results indicate that in the later stages of primary schooling, the school, educators, and educational surroundings become capable to diminish the initial effects of the socioeconomic status on educational achievement, and provide more equal

opportunities for students of different family backgrounds.

Further, results show that the level of socioeconomic development of the school surrounding, as additional indicator of the municipality's urbanization, is also related to school achievement. This was expected, since in the Croatian social circumstances a substantial relation between the urbanization level and the level of socioeconomic development is reported (UNDP, 2007). In general, as the developmental level of the school municipality increases, the average achievement of schools rises. Schools located in the areas that are below the national average according to their level of socioeconomic development are also below the national average in their academic achievement. The opposite is the case for schools in the above average developed areas – their educational performance was also above the national standard. This pattern is observed equally in the fourth and in the eighth grade, although the effects are again somewhat more pronounced in the lower grades than at the end of the primary schooling. The same reasons suggested in the earlier explanation of weaker effects of the lower level of urbanization in the eighth grade are probably also applicable here, although to a smaller extent. In fact, the overall comparison of results indicates that the level of socioeconomic development has greater effects on achievement than the level of urbanization, both in fourth and in the eighth grade. In the operationalization of the level of socioeconomic development different factors are taken into account – those of financial and economic nature, as well as those pertaining to human potentials, e.g. demographic dynamics and educational structure of the population in the area. This implies that the previously described characteristics, such as the socioeconomic status and the educational level of a

students' family, as well as the available financial resources, may play a more prominent role in the achievement of schools than the level of urbanization per se.

The findings of the empirical study described in this chapter can and should be considered from the perspective of the educational policy. Firstly, it is obvious that marked differences exist in the educational outcomes between schools located in municipalities of different urbanization levels. Hence, an action plan is called for, in which the short- and long-term goals will be focused on the minimization of the observed differences. Since this is a broader social issue, it is obvious that the governmental institutions (e.g. the Ministry of Education) will not be able to solve it on their own. This issue should be integrated and addressed as a part of the broader regional policy that would lead to an even regional development. Secondly, in order to ensure equal opportunities for a quality education for all, specific action plans should be based on the existing research findings. They should encompass a number of different actions, such as raising the awareness of teachers about this problem, as a first step in any sustainable intervention plan. Next, preschool education should be broadened in order to harmonize the children in their readiness for school, with special emphasis on schools in the rural areas, which implies a more efficient use of the existing school daycare programs as well. Finally, individualized teaching focused on specific needs of particular students should be strengthened, especially in rural municipalities, as a mean of improving the performance of low performers. Of course, all these actions should be encompassed with multifaceted social interventions which will lead to greater and more balanced socioeconomic development of the country.

Conclusion

In this chapter, we tried to explore the existence and extent of differences in educational achievements between areas of Croatia with disparate levels of urbanization and socioeconomic development. Since the proclaimed educational policy is that all the students should have equal opportunities for a quality education, the results of this study can be observed as an indicator of the outcomes and as an empirical verification of the degree to which the proclaimed policy is accomplished. It is evident that marked differences exist in educational achievements, which clearly coincide with the developmental characteristics of certain territorial units – the educational outcomes are higher in the urban and more developed areas and lower in the rural and less socioeconomically developed areas. The obvious disparities between the stated goals of the educational policy and the attained outcomes in achievement clearly call for interventions within the educational system, but also for actions at the level of general national social policy. The desirable ambition of the national policy should be to minimize the observed socioeconomic differences to the lowest possible extent, but the proclaimed, obligatory, and achievable goal of the educational stakeholders should be to assure equal quality of education for all regardless of the developmental level of the local community. A reason for optimism is the finding that the differences in achievement related to socioeconomic development tend to decline with years spent in the educational system, which indicates that the educational system already manages to compensate to an extent the adverse factors which are at work in rural areas. We hope that the efforts taken in this direction will result in further reduction of the educational inequalities and that each primary school in Croatia will become a place of high standard education and of equal educational opportunity.

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SECTION 2

POLICY FOR FAMILY INVOLVEMENT FOR FORMAL EDUCATION

Section 2 Contents

Chapter 8	221
Teenagers At-Risk of Dropping Out of High School. Parents' and Teachers' Views on Family Involvement	
<i>Raquel-Amaya Martínez-González, Lucía Álvarez-Blanco, & M^a Henar Pérez-Herrero</i>	
Chapter 9	259
Teachers' Reflections on Parental Involvement in Emergent Literacy Development in Rwanda	
<i>Pierre Canisius Ruterana</i>	
Chapter 10	283
Home-School Agreements in England: Symbolic value and contractual relationships between school managers, parents and pupils	
<i>Howard Gibson</i>	
Chapter 11	321
Homeschooling: The Rising Parent Entitlement	
<i>Karen Freeman</i>	

Chapter 12 **337**
Upbringing Process Quality and Cooperative Learning in Family
within Latvian Transforming Society
Dace Medne

Chapter 13 **373**
Parent Empowerment: Examining Parental Attitudes of School
Systems
Julian Brown

Chapter 14 **403**
The social role of Grandparents: Values, Attitudes, Purposes
and Behaviours
Giulia Cavrini & Liliana Dozza

CHAPTER 8

TEENAGERS AT-RISK OF DROPPING OUT OF HIGH SCHOOL. PARENTS' AND TEACHERS' VIEWS ON FAMILY INVOLVEMENT

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Abstract

This chapter presents comparative results between parents and teachers on family involvement in the education of their teenagers at-risk of dropping out of high school. A questionnaire with a Likert type scale of five categories was applied to a sample of 61 Spanish parents and 47 teachers from three secondary schools. Descriptive and *t*-test comparative measures were calculated on variables classified within three dimensions of parental involvement: 1) contextual conditions at home for personal and academic development, 2) intellectual and academic expectations on the teenagers, and 3) family dynamics regarding school work. The findings indicate that parents feel more involved

in their teenagers' education than the teachers perceive them to be. However, parents would like to learn some more about studying skills to support their teenagers with homework better. Consequently, it is suggested that both parents and teachers should communicate more effectively in order to control the risk of dropping out better. Thus, building teachers-parents partnership is recommended.

Key words

Parents – Teachers - Family Involvement – Teenagers -
Risk of Dropping-Out - High School

Introduction

High school drop-out phenomenon

The transition to high school is significant in the decision of students to drop out of school. The phenomenon of teenagers' dropping out of high school before completion is a social challenge (Coleman 1988) because, as Becker (1993) suggested, societies cannot afford to lose human capital and potential productive citizens.

The importance of attaining a high school diploma is increasing over time because of its association with the current trend of increased minimum competence expectations to enter educational and employment institutions (Bell 1999; Bourdieu 1977). This fact leads stakeholders to expect that all human capital be developed to its highest capacity (Kilpatrick, Field, & Fall 2003).

McCaul, Donaldson, Coladarci, & Davis (1992) claimed that the negative consequences of dropping out increase with the passing of time; this applying specially for male students attending state schools and who come from low-income or ethnic minority families; for these students graduating from high

school seems to be more difficult than to others (Coleman, & Husén 1985; Marjoribanks 2002).

Among the many factors associated with dropping out of high school before completion, researchers as Corville-Smith, Ryan, Adams, & Dalicandro (1998) and Marjoribanks (2004) acknowledged individual personality traits, home and school environments (Stearns & Glennie 2006), ethnicity and the social and economic context within which students live. Research showed an association between family income and dropping out (Fredricks, Blumenfeld, & Paris 2004); high school students from families with low income are more likely to drop out. This also applies to neighborhoods (Ensminger, Lamkin, & Jacobson 1996), maybe because, as South, Baumer, & Lutz (2003) stated, students in socioeconomically distressed neighborhoods feel that school completion offers little either to improve the quality of life in their neighborhood or to provide mobility into a better one.

According to Fenández-Enguita, Mena-Martínez & Rivere López (2010), 28.4% of high school Spanish students dropped out the school system in the 2006-2007 academic year without a diploma; this will probably lead them to face a lifetime of lower wages and limited opportunities. The problem affects more to state schools (34.7%) than to private schools (16.2%) and to inmigrant students (45%). On the other hand, the European Commision Eurostat report on "Education and Training for 2020", indicates that school drop out rate in Spain is higher than 30%, in comparison with the 14.1% average rate of the European Union countries. The causes for this might be associated with, among other factors, the school system itself and the teaching methods (Lan, & Lanthier 2003; Janosz, Archambault, Morizot, & Pagani 2008), the social-environmental factors (South, Baumer, & Lutz 2003) and the family dynamics (Marjoribanks 2004; Martínez-

González, Symeou, Álvarez-Blanco, Roussounidou, Iglesias-Muñiz, & Cao-Fernández 2008).

These findings might be framed within the reproduction of social class theory by Bourdieu (1977) and Bourdieu and Passeron (1990). According to this theory, social capital serves to the creation of human capital through education; however, the power and ideology embedded in education and its practices leads to cultural and social inequalities which are reproduced by social classes. Empirical evidence of this theory has been shown by research; among other authors, Marjoribanks (2002, 2003, 2004) explored the relationships among families, schools, individual characteristics and young adults' outcomes.

Grade retention, understood as the situation when a student repeats the same grade level of school, is one of the most powerful predictors of dropping out; research evidence shows that being retained in earlier grades increases the impact of students' risk of dropping out of high school (Jimerson, Anderson, & Whipple, 2002; Jimerson, Ferguson, Whipple, Anderson, & Dalton 2002). On the other hand, grade retention affects, among other factors, the student's self-esteem, socio-emotional adjustment, peer relations and school engagement; all these factors are also connected with the risk of disengagement from school and dropping out. In order to cope with this, Croninger & Lee (2001) claimed the outstanding role of caring teachers as an important source of social capital for students.

Researchers also remark that early interventions before middle school and high school, are the most powerful strategies to prevent students from dropping out because this phenomenon is the result of a long-term process of disengaging from school (Marcon 1999). These interventions should take into account at

least two outstanding factors which might have a worth impact in preventing dropping out (Horvat, Weininger, & Lareau 2003): home environment and family dynamics and schooling conditions -school organization, teaching practices, school climate, etc.-. Croninger & Lee (2001) and Lee & Burkam (2003) claimed that positive relationships with their teachers reduce the students' probability to drop out of school. In this way, promoting caring school climates together with collaborative programmes with parents, can result in preventing school failure (Henderson 1987; Simon 2004) and controlling the likelihood of dropping out. Consequently, school-family partnerships sounds imperative.

In order schools can foster this partnership with parents it seems necessary to explore to which extend teachers are informed about and understand both the family dynamics of the teenagers at risk of dropping-out and the parents' involvement in their children's education. Thus, this study focuses on exploring to which extend parents and teachers agree in considering several areas of parental involent in their teenagers' academic process.

1. School-family partnerships

As mentioned previously, children's education is an area of concern for different stakeholders as families, schools and other social agents, who need to collaborate for suggesting effective partnership strategies that best contribute to the intellectual and social development of children (Bronfenbrenner 1979, 1986; Crozier 2000; Epstein 2011; Henderson, Mapp, Johnson & Davies 2007).

Epstein (2001) claimed that schools alone cannot always provide all students with the personal and cultural competences needed to be successful within

the educational system. The family and the school as socializing agents are called to control this risk of failure, as Coleman (1988, 1997, 1998) pointed out. According to the social reproduction theory by Bourdieu (1977), school failure might thus generate social failure due to the difficulty people without academic credentials may encounter to reach a proper social, cultural and professional adaptation.

Consequently, both the family and the school directly and indirectly influence student ability, motivation, and interest in learning (Marjoribanks 2004; Martínez-González & Corral-Blanco 1991; Walberg 1984). When working together, their cooperation might have important effects on learning (Coleman 1988; Graue, Weinstein & Walberg 1983; Walberg 1984). After reviewing a considerable number of studies on this matter, Henderson (1987) and Henderson, Mapp, Johnson & Davies (2007) stated that creating a positive learning environment at home, including encouraging positive attitudes towards education and high expectations of children's success, has a powerful impact on their academic achievement. These ideas have been also remarked by the Council of Europe Recommendation (2006/19) on *Policies to Promote Positive Parenting*.

Moreover, Epstein (1997) proposed the international well known model of *Overlapping Spheres of Influence of Family, School and Community on Children's Learning* to convey the importance and to understand the need of family-school-community partnerships. This model assumes that collaboration among parents, school personnel and community members contributes to the efforts towards effective and efficient personal, academic and social success for children. However, to build this partnership, mutual trust between parents and teachers is imperative. According to Deslandes, Fournier & Rousseau (2005)

and Rempel, Holmes and Zanna (1985), trust in the other party appears when there is a match between the expected behaviours and the observed ones, and these are maintained over time. Thus, in the present study we analyse teachers' trust in Spanish parental involvement of teenagers at-risk of dropping out of high school as a precondition to build partnerships between them for the benefit of these at-risk students.

1.1 The Spanish Educational Context for School-Family Partnership

In the last decades, Spanish researchers showed an increasing interest in analysing factors affecting school-family partnerships as a potential predictor of children's behaviour and school achievement (see Bazarra, Casanova & Ugarte 2007; Comellas 2009; Forest & García Bacete 2006; García-Bacete & Martínez-González 2006; Franco-Martínez 1989; Gregorio-García 1990; Kñallinsky 1999; López-Larrosa 2009; López-López 2006, 2008; Martínez-González, Pérez-Herrero & Rodríguez-Ruiz 2005; Villalta, Tschorne & Torrente 1989). Also, in these last decades, Spain, as other European developed countries (Council of Europe 2006), experienced important political and social changes. Among them, democratization of the social discourse, equalitarian policies for men and women, women access to the labour market, diversity of family structures and dynamics, immigration, competitiveness in the labour market, integration of information and communication technologies (ICTs) in the broad social life, diversity in job opportunities, etc. All of which affect families', schools' and communities' dynamics and their effects on education and students' outcomes.

As a result, teachers and schools need to adjust their traditional educational expectations and roles to these

new family and social demands. Nevertheless, neither the schools, nor the teachers or the educational system as a whole are yet ready to take over such responsibilities. This many times leads to confrontation between parents and teachers, especially when the children fail academically at secondary school.

Parents' involvement in schools has been legislated in Spain since the 1970s, with the objective of promoting the quality of children's education. The most relevant partnership actions taking place in Spanish schools nowadays are: 1) parents' participation in general meetings held for groups of parents of children attending the same classroom, 2) parent-teacher interviews, 3) meetings and activities performed by parents' associations, and 4) parents' participation in school councils. These are important areas of involvement; but they are not always performed in an effective way in terms of stimulating parents' frequent participation as a preventive measure against pupils' misbehaviour, academic failure and dropping out (Epstein 2011; Hiatt-Michael 2001; Martínez-González et al. 2000; Martínez-González et al. 2005; Musitu & Cava 2001; Redding 2005; Symeou 2007).

Consequently, this research focuses on both the self-confidence parents have on their own involvement in the education of their children -taking into account that the latter are teenagers at-risk of dropping out of high school-, and the trust teachers build in that parental involvement. According to the social reproduction theory mentioned above and given the special academic characteristics of their children, it could be expected these parents lack confidence on their own involvement. This study looks for contrasting this idea. On the other hand, teachers' trust is understood as a pre-requisite to build both mutual confidence with parents and an adequate collaboration with them to better cope with the dropping-out

phenomenon that both of them experience in their respective environments, at home and at school. Thus, comparing parents' and teachers' points of view would help to draw a clearer picture about some initial conditions to foster partnerships between both of them.

In this way, this chapter presents comparative results between Spanish parents and teachers framed within the European project *Drop-Out Open Door (DOOR)* (Socrates, 112578-CP-1-2003-1-NL-COMENIUS-C21), which investigated the phenomenon of pupils' dropping out from compulsory secondary education in the formative ages of 13-16 years. Apart from Spain, other countries participating in the project were Austria, Cyprus and The Netherlands.

For the purpose of this European project, "dropping out" was defined as the situation in which pupils voluntarily give up their studies and the school before the age they are expected to and without the corresponding certificate; in this case, according to the Spanish educational laws, namely before completing compulsory secondary education.

This study might appear significant for supporting the Spanish educational system to find strategies to cope with this social phenomenon, given the high figure of dropping out in this country (more than 30%) compared with the European average (14.1%). In this research, comparisons between parents and teachers on key issues of parental involvement were made. Also, its findings might promote the exchange of ideas, initiatives and experiences related to this problem in high school internationally, and may suggest that schools, educational leaders, policymakers and other stakeholders should introduce effective educational interventions to support parents to be better involved in their teenagers' education.

2. Method

2.1 Objective and Main Questions

This study was designed to gain an insight into three dimensions of family involvement in their teenagers' education, which, according to the studies revised previously, might be related to their school achievement and the risk of dropping out: 1) Contextual conditions at home for children's personal and academic development, 2) Intellectual and academic expectations on the teenagers, and 3) Family dynamics regarding school work.

The objective was to compare parents' and teachers' perceptions on the issues selected with the main aim of identifying similarities and differences in the way they both perceive family educational dynamics and to suggest further effective interventions to support these families and their teenagers.

The questions associated to this objective and the dimensions mentioned were: To what extent do parents and teachers agree in considering 1) contextual conditions at home for personal and academic development?; 2) intellectual and academic expectations on the teenagers?, and 3) family dynamics regarding school work?

In spite of the literature revised previously that suggests there is an association between children's school outcomes, social and cultural resources at home and family involvement in their children's education (Horvat, Weininger, & Lareau 2003; Lareau 2000), the main hypothesis in this study was that parents of teenagers at-risk of dropping out really care for their teenagers' learning and school results. They try to do their best in helping them to cope with their

school difficulties because they are aware their teenagers need the high school diploma to enter further education or labor market institutions; nevertheless, they might lack the right strategies to help them efficiently. On the other hand, it was expected that due to the poor marks these teenagers reach, teachers perceived parents are not sufficiently involved in their education; this having a negative influence on building up mutual partnership for the benefit of the students. In short, it is expected that parents perceive they are more involved in their teenagers' education at home than teachers think, because they try to control their teenagers' risk of school failure.

2.2 Procedure

In selecting the study sample, variables suggested by international literature as affecting pupils' dropping out were taken into consideration (Coley 1995; Rumberger 1995). According to this literature, the family, school and community variables may be related to the drop-out figures, thus constituting the basis for the initial selection of three Spanish high schools. The criteria set for the selection of these schools were based on their location (urban, semi-urban and rural), their size in terms of number of pupils (large, average and small on the basis of the national figures), their socio-economic status catchments area (schools placed in upper class, middle class and lower class neighbourhoods), and the percentage of pupils dropping out of high school (schools with both a percentage above and below the national average percentage of drop-outs for the last couple of years). This selection assured the desired diversity of the participant school target group.

The families' sample (parents/care givers) that participated in this study within each school was

selected on the basis that their teenager might be a potential drop-out before graduating. The criteria set for identifying the families were the combination of the following individual characteristics of the teenagers: poor school results, second year at same level (retention) or some course and discipline problems (i.e. having been suspended or having been repeatedly reported for misbehaviour and/or truancy).

2.3 Participants

The sample was composed of 61 Spanish parents whose teenage children were at-risk of dropping-out and 47 high school teachers who taught those children in the second or in the fourth grade of compulsory secondary school. Participation for both parents and teachers was on a voluntary basis.

Analysing *parental educational background*, most of the parents had primary school background (41% in the case of fathers and 60.7% in the case of mothers). Less than 20% had high school education (18% of mothers and 16.4% of fathers finished compulsory secondary school), while 9.8% of mothers and 21.3% of fathers had completed technical/vocational studies. Only 1.6% had reached university level and the same percentage had not finished primary education. As stated in the literature revised previously (Bourdieu and Passeron 1990; Marjoribanks 2002, 2004), these findings show that parents of teenagers at-risk of dropping out are likely to be less literate, which may condition the quality of their involvement in providing a positive and stimulating home environment to reach academic success; it might condition specially the quality of the help they can give to their teenagers in relation to homework and curricular matters.

According to their gender, the parents in the sample were mostly mothers (75.4%); another 11.5% represented couples and 9.8% fathers. These findings

confirm the traditional expectation that mothers are more involved in their children's school development than fathers are, which has been extensively proved to be so internationally (Crozier 2000; Lareau 2000; Reay 1998; Symeou 2007).

As for the 47 teachers in the sample, 66% were female and 34% males. Their teaching experience ranged from 11-15 years for the 29.8% and more than 25 years for the 23%. These teachers acted also as tutors of the students at-risk of dropping out considered in this study, so they knew the students and their parents to a great extend.

2.4 Procedure to gather information/Instruments

Data were collected through parallel questionnaires to parents and teachers based on the work performed by Adams & Christenson (2000) on trust and the family-school relationship. The questionnaires were validated and adapted to the DOOR's European project purposes by expert researchers and teachers involved in the project from the four European countries involved: Austria, Cyprus, Spain and The Netherlands. The responses to the two respective questionnaires were rated on a five-point Likert scale ranging from 1-'I Totally Agree', 2-'I Agree', 3-'In Between', 4-'I Disagree' and 5-'I Totally Disagree'. A 'no opinion' option was also provided. The issues included in the questionnaire helped to gain insight into the family dynamics and parental attitude towards their involvement in their teenagers' education and schooling. The original questionnaire for parents includes 63 item/variables, and 89 for teachers. The Cronbach's alpha for the respective questionnaires were .74 for parents and .97 for teachers.

For the purpose of the study reported here only twelve items/variables of parental involvement were selected from each of the original questionnaires; the selection was based on international expert criteria according to the three dimensions under research here and the literature reviewed. Due to the small size of the samples and the extensive number of items/variables included in the original questionnaires, it was not possible to carry out factor analysis to obtain composite scores throughout correlations; consequently international expert-content validation using qualitative and quantitative data, as suggested by McKenzie, Wood, Kotecki, Clark, & Brey (1999) and Rubio, Berg-Weger, Tebb, Lee, & Rauch (2003), was performed to select items to be analyzed in reduced scales. This might have affected the reliability obtained in these reduced forms of the original questionnaires; the Cronbach's alpha for parents and teachers were .406 (12 items/variables) and .712 (12 items/variables), respectively. This expert-content validation was performed at a European level within the already mentioned DOOR Socrates project.

More specifically, the twelve items/variables selected and their relation with the three dimensions under analysis are summarised in table 1.

Parental involvement in their teenagers' academic progress	
Dimensions	Items/Variables analyzed
1. Contextual conditions at home for personal and academic development	<ol style="list-style-type: none"> 1. The teenager have adequate eating, sleeping and hygiene habits 2. The teenager has the right environment to study at home 3. Parents are willing to buy the school materials their teenagers need 4. Parents feel welcomed at the school

2. Intellectual and academic expectations on the teenagers	<ol style="list-style-type: none"> 1. The teenager has enough intellectual skills to succeed at school 2. Parents wish their children get better qualifications than they themselves had
3. Family dynamics regarding school work	<ol style="list-style-type: none"> 1. The teenager's school work causes home conflicts 2. Parents support the teenager and criticize the school when problems arise 3. Parents tell off their teenagers when they get poor marks or fail exams 4. Parents support their teenagers when they have difficulties with certain subjects 5. Parents help the teenager with homework 6. Parents would like to be informed about studying skills

Table 1. Distribution of items/variables according to dimensions

In the parents' questionnaire there were also some questions regarding their level of education and the gender. In the teachers' one, information about their gender and the grades they taught was asked.

Teachers' questionnaire was self-administered, while the one for parents was applied as a structured interview in order to complement the quantitative data with qualitative information to better understand the reasons for their perceptions and behaviours.

2.5 Data Analysis

Data were analysed through descriptive measures and *t*-test comparative analysis subtracting from the parents' group mean the teachers' one on the variables selected, i.e. parents' group mean minus teachers' group mean.

3. Results

This section describes the results obtained when comparing parents' and teachers' perceptions on the dimensions analysed about parental involvement in

the education of their teenagers at-risk of dropping out.

This research investigates issues of the so called "curriculum of the home" (Marjoribanks 2004; Redding 2000; Walberg 1984), which might have an influence of children's academic progress and achievement, such as physical resources, parental support and guidance, educational pressure, encouragement, and expectations.

3.1 Contextual conditions at home for personal and academic development

Most parents in the sample have only primary school level. Given that literacy standards is many times associated to the family socio-economic status, family dynamics and children's school achievement (Bourdieu and Passeron 1990; Lareau 2000), in this study it was explored whether parents and teachers perceive the teenagers at-risk of dropping out have adequate home conditions for personal and academic development. More specifically, it was analysed whether the teenagers have *adequate eating, sleeping and hygiene habits*. Significant statistical differences were found between parents and teachers in considering this matter (parents' mean=1.79, sd=1.01; teachers' mean=2.59, sd=1.16) ($t(61,37)=-3.60$; $p.001$). It seems most parents (78.7%) can guarantee those conditions at home; but teachers tend to doubt it to some extend. Only 42.6% of the teachers think the teenagers have adequate habits in the issues considered.

When analysing *contextual conditions for studying at home*, significant statistical differences between parents and teachers were found regarding whether the teenager has *the right environment for doing so* (parents' mean=1.43, sd=.805; teachers' mean=2.97, sd=1.13) ($t(61,34)=-7.32$; $p.000$). This result

indicates that while parents are quite sure their children have an adequate environment for studying at home, teachers have many doubts about it; in fact, while 90.1% of the parents agree on the statement, only 29.8% of the teachers do so. Again, their respective perceptions are quite different.

Another issue to pay attention to when analyzing the contextual conditions for studying at home is whether *parents are willing to buy the school resources their teenagers need* (books, note books, pens, computer, etc.). Nowadays, teenagers need a wide diversity of school materials to perform their academic tasks. At high school they use different books for each subject, note books, etc. plus computers and other related technologies. Some times these materials cost a great amount of money that some families can hardly afford. Given the school failure the teenagers under study here face, parents could think that buying this school material is a waste of money. On the other hand, most of the parents in the sample reached only primary school, which might condition their perception about the importance of the school materials their teenagers need at present. Comparisons between parents' and teachers' perceptions on this issue showed significant statistical differences (parents' mean=1.21, sd=.755; teachers' mean=2.24, sd=1.33) ($t(61,29)=-4.68$; $p.000$). Both of them agree in considering that parents are willing to buy the school materials, but while most parents (95.1%) are sure of this, teachers have some doubts; in fact only 46.8% of them think parents are willing to buy these resources.

Since parents-teachers partnership is expected to stimulate both parents' and teenagers' involvement in academic dynamics at home, it seemed interesting to analyze from both the parents' and the teachers' perspective whether the former *feel welcomed at the school*. Significant statistical differences were found

between them (parents' mean=1.20, sd=.480; teachers' mean=1.74, sd=.685) ($t(60, 38)=-4.56$; $p.000$). Most of the parents and the teachers perceive parents feel welcomed, but while practically the total sample of the parents tend to agree totally on that (95.1%), the figure for teachers decreases to 70.2%; that is, there is still 30% of teachers who doubt it or know for sure that parents with teenagers at-risk of dropping out do not feel comfortable at school. The high figure obtained for parents is interesting and positive taking into account that the academic problems their teenagers face could have made them feel uneasy at the school. Table 2 summarises the findings of this dimension

Table 2. Contextual conditions at home for personal and academic development

Contextual conditions at home for personal and academic development										
Variables analyzed ¹	t de Student ²	Sig.	Parents (n=61)				Teachers (n=47)			
			M ³	Sx	% ⁴	N	M	Sx	%	N
Considera that their teenagers have adequate eating, sleeping and hygiene habits	-3.602	.001	1.79	1.018	78.7	61	2.59	1.166	42.6	37
The teenager has the right environment to study at home	-7.319	.000	1.43	.805	90.1	61	2.97	1.132	29.8	34
Are willing to buy the schools materials their teenagers need	-4.679	.000	1.21	.755	95.1	61	2.24	1.327	46.8	29
Parents feel welcomed at the school	-4.559	.000	1.20	.480	95.1	60	1.74	.685	70.2	38

¹ Likert: 1- Total Agree; 2- Agree; 3-In between; 4-Desagree and 5-Total Desagree

² Student t= (Mean of Parents)-(Mean of Teachers)

³ M= Mean

⁴ The answers "Total Agree" and "Agree" were computed together

3.2 Intellectual and academic expectations on the teenagers

The academic transition from primary to high school involves personal and intellectual challenges that students need to face to be able to adapt themselves to the new academic demands and standards. The increasing number, extension and complexity of the subjects to be learnt at high school, together, among other things, with changes in the teaching methods and teachers-students interactions, requires the students to gain autonomy, intellectual, emotional and personal competences. In high school students need to be able to manage concentration, understanding, creativity, strategies to look for information, and for classifying and associating it, etc. (Kitchener 1986). Some students might experience intellectual difficulties to effectively manage these learning processes, thus affecting their learning outcomes and school achievement.

Given the especial characteristics of the students referred to in this study, as being at-risk of dropping out of high school, it seemed interesting to analyze whether both parents and teachers agree in considering that the *teenager has enough intellectual skills to succeed at compulsory high school*. The significant statistical differences obtained between them (parents' mean=1.38, sd=.78; teachers' mean=2.30, sd=1.14) ($t(60,43)=-4.84$; $p.000$) indicate that while most of the parents tend to totally agree on this (91.8%), teachers do so only to some extent; in fact 40.4% of them disagree or have some doubts.

On the other hand, positive educational expectations on children have proved to be an important source of motivation for them to reach the expected aims. Worrell and Hale (2001) found that hope in the future

act as a protective factor in school dropouts. Moreover, parents' and teachers' expectations towards children have been described as powerful resources to shape children's attitudes, behaviours and self-control competences. Thus, parental academic expectations towards their children might have an influence on their own academic expectations and aims. Since a substantial percentage of the parents in this research have primary literacy standards and their children are at-risk of dropping out of high school, it seemed interesting to check the extend *the parents expect their teenagers get better qualifications than they themselves did* and whether teachers perceive so. The findings indicate there are significant statistical differences between parents and teachers on this matter (parents' mean=1.31, sd=.904; teachers' mean=1.87, sd=.887) ($t(61,31)=-2.82$; $p.006$). Parents clearly indicate they would like their children to reach better qualifications than they themselves reached. Teachers also perceive this parental wish, but in a shorter degree. It seems parents are aware of the current social importance to gain academic credentials and qualifications in order to be able to better adjust to social and labour market demands. According to the percentual figures obtained, most parents wish so (90.2%), independently of their educational level. The teachers' percentage of 55.3% suggest that only half of the sample perceive this parental aim; there still remains a 44.7% of teachers who do not think or doubt whether parents of students at-risk of dropping out of high school are really interested in promoting better qualifications in their teenagers than the ones they themselves have. This finding indicates lack of communication and understanding between parents and teachers regarding educational expectations and aims for the teenagers. Consequently, teachers-parents partnerships should be promoted to enable them to adjust their mutual expectations towards these students and to work together in the same

direction. Table 3 summarises the findings of this dimension.

Intellectual and academic expectations on the teenagers										
Variables analyzed ⁵	t de Student ⁶	Sig.	Parents (n=61)				Teachers (n=47)			
			M ⁷	Sx	% ⁸	N	M	Sx	%	N
The teenager has enough intellectual skills to success at school	-4.839	.000	1.38	.783	91.8	60	2.30	1.145	59.6	43
Wish their children get better qualifications than they themselves did	-2.825	.006	1.31	.904	90.2	61	1.87	.887	55.3	31

Table 3. Intellectual and academic expectations on the teenagers

3.3 Family dynamics regarding school work

Many authors claimed that school achievement is a good indicator of labor market access and professional development (Becker 1993; Bourdieu & Passeron 1990; Bell 1999). The current social and labor market conditions and trends in developed countries show that citizens need to prove they are well prepared and competent to reach and maintain a qualified job. In this way, it is not surprising that parents expect their children to be successful at school in order to reach better social and job conditions in the future. When these parental expectations are frustrated because the children fail at school or are not involved in school work, family conflicts may arise. Thus, in this study we explored whether parents and teachers consider that the teenagers' school work causes home conflicts as a possible indicator of parental involvement. The findings show significant statistical differences

5 Likert: 1- Total Agree; 2- Agree; 3-In between; 4-Disagree and 5-Total Disagree

6 Student t= (Mean of Parents)-(Mean of Teachers)

7 M= Mean

8 The answers "Total Agree" and "Agree" were computed together

between parents and teachers to this respect (parents' mean=2.30, sd=1.45; teachers' mean=3.04, sd=1.22) ($t(61,27)=-2.31$; $p.023$). While parents mostly agree on the matter, teachers have doubts. Moreover, according to parents' information, this situation is affecting 67.2% of the families surveyed; in the case of the teachers, only 23.4% believe so.

At high school level, the teenager is usually the main connection between teachers and parents; they comment at home about their teachers, what is going at school and in the classroom, the problems they face at school, etc. As Deslandes & Bertrand (2005) claimed, it is partly through their children that parents come to know the teachers and appreciate their attitudes and behaviours. When children experience school problems they might tell the story at home from their own perspective, trying to gain their parents' sympathy; being this more likely with high school teenagers than with younger children. Consequently, in this study we analyzed to which extend both parents and teachers perceive that *parents support the teenager and criticize the school when problems arise*. Results indicate that both of them tend to consider parents do not behave in this way (parents' mean=4.31, sd=.933; teachers' mean=4.22, sd=1.03); moreover, no significant statistical differences were found between parents and teachers to this respect ($t(59,32)=.4056$; $p.687$). Nevertheless, the percentage of teachers who believe that parents support the teenager and criticize the school when problems arise is much higher (48.9%) than that of the parents (16.4%). A possible indicator of parental interest and involvement in their children's academic progress is the parents' tendency to *tell off their children when they get poor marks or fail exams*. Parents usually expect their children succeed at school and feel worried when they fail exams and bring home poor marks; this might lead to tension and telling-offs

for not having assumed their responsibility to do well at school. When talking about teenagers at-risk of dropping out, parents might often scold them in an attempt to stimulate their interest in being more involved in their academic tasks. Other times it might be possible that these parents feel discouraged to do so if they give up the hope that their children improve at school. The findings indicate there are significant statistical differences between parents and teachers on this regard (parents' mean=1.90, sd=.978; teachers' mean=2.86, sd=1.06) ($t(61,29)=-4.231$; $p.000$). Most parents agree completely that they tell off their teenagers, while teachers tend to doubt it and some of them disagree; in fact, only 25.5% of the teachers in the sample consider to some extent that the parents tell off their teenagers. As for the parents, the percentage reaches 67.2%; yet, there are 32.8% of the parents whose reactions on this matter go in a different way.

Parental involvement in their children's education can also take the form of *supporting them when they face difficulties with certain academic subjects*. This support can be delivered in different ways, such as listening, encouraging, explaining some topics and even trying to help them with homework. In this study, the affective shape of support, such as listening, talking and encouraging was taken into account. It seems interesting to know whether parents of at-risk of dropping out teenagers keep on encouraging them even when their respective expectations of success might be very low. This might be an indicator that these parents are willing to fight against their children's school failure. It is also worth noticing how teachers perceive this parental attitude, as it might condition their readiness to support these parents in their endeavor. The findings show significant statistical differences between parents and

teachers on the matter (parents' mean=1.44, sd=1.02; teachers' mean=2.74, sd=1.26) ($t(61,31)=-5.30$; $p.000$). Most parents (88.5%) tend to agree completely with the fact that they support their teenagers when they face difficulties with certain academic subjects. However, teachers tend to doubt parents do so and only 31.9% are sure they do it.

When considering whether *parents help the teenager with homework*, results show significant statistical differences between parents and teachers (parents' mean=2.66, sd=1.56; teachers' mean=3.33, sd=1.18) ($t(61,30)=-2.099$; $p.039$), which suggests that parents perceive they help their teenager with homework more than teachers expect. According to their respective mean values and standard deviation, there is a wide diversity of answers in the two samples, but while parents tend to agree on it, teachers tend to doubt and to disagree, and 36% of them did not answer the question. This might mean that while many parents try to do their best to support their teenagers with homework, teachers think they are not much involved. The percentages obtained for both of them on this matter confirm so: 55.8% of parents agree they help the teenagers with homework, while the figure for teachers who agree on this is only 12.8%. Maybe the poor academic results these teenagers reach make teachers think their parents are not much involved in helping them with homework.

Probably parents find some difficulties to support their teenagers at-risk of dropping out to use their studying skills efficiently, and would like to be informed about effective ways to do it. If teachers, on the other hand, expect parents to take care of their teenagers' academic success, probably perceive parents are eager to know effective ways to support their teenagers' learning. Findings show that there are not significant statistical differences between parents and

teachers when considering whether *parents would like to be informed about studying skills* (parents' mean=1.69, sd=1.14; teachers' mean=1.83, sd=1.01) ($t(61,35)=-.6$; $p.550$). According to the standard deviation values in the two samples, there is a wide variety in the parents' and teachers' answers to this matter: from totally agree to totally disagree. Nevertheless, while 83.6 % of the parents agree on it, the figure for teachers decreases to 57.5%.

Table 4. Family dynamics regarding school work

Family dynamics regarding school work										
Variables analyzed ⁹	t de Student ¹⁰	Sig.	Parents (n=61)				Teachers (n=47)			
			M ¹¹	Sx	% ¹²	N	M	Sx	%	N
Consider that their teenagers school work causes home conflicts	-2.313	.023	2.30	1.453	67.2	61	3.04	1.224	23.4	27
Parents support the child and criticize the school when a particular problem arises	.405	.687	4.31	.933	16.4	59	4.22	1.039	48.9	32
Tell off their teenagers when they get poor marks or fail exams	-4.237	.000	1.90	.978	67.2	61	2.86	1.060	25.6	29
Support their teenagers when they have difficulties with certain subjects	-5.305	.000	1.44	1.025	88.5	61	2.74	1.264	31.9	31
Parents hel the teenager with homework	-2.099	.039	2.66	1.559	55.8	61	3.33	1.184	12.8	30
Parents would like to be informed about studying skills	-.600	.550	1.69	1.148	83.6	61	1.83	1.014	57.5	35

⁹ Likert: 1- Total Agree; 2- Agree; 3-In between; 4-Desagree and 5-Total Desagree

¹⁰ Student t= (Mean of Parents)-(Mean of Teachers)

¹¹ M= Mean

¹² The answers "Total Agree" and "Agree" were computed together

This result and the previous ones obtained in the other issues analyzed in this study inform that most parents in the sample are concerned about supporting their teenagers' learning at home, but they lack the right strategies to do so efficiently; consequently, thus confirming the hypothesis stated in this study. The findings for teachers on these issues suggest they probably know through the teacher-parents interviews they hold regarding the students' progress, that some parents expect support to be efficiently involved in their teenagers' education. Consequently, teachers and schools should promote partnership measures with parents to fulfill this parental expectation. Table 4 summarises the findings of this dimension.

Discussion, conclusion and educational implications

In an attempt to better understand what is going on in the home of teenagers at-risk of dropping out of high school regarding parental involvement, we analyzed some issues related to the so call "curriculum of the home", also pointed out by Martínez-González & Corral-Blanco (1991), Redding (2000) & Paik (2004) when studying the relationship between home values and school achievement. The main objective of this research was to have an insight into the family dynamics these teenagers usually experience, with the aim to grasp whether they have the adequate environmental, physical, emotional and academic conditions which facilitate academic motivation, involvement and school outcomes. If these conditions were not as expected, they could act as a possible explanation of these teenagers' poor academic results.

In this study, these matters were analyzed from the parents' perspective, but at the same time, we wanted to contrast this parental information with the teachers' perception on the same issues; the idea was to assess to which extend they both share expectations about

family potentials, limitations and difficulties to engage these teenagers at-risk of dropping out in their academic tasks and responsibilities. Other authors as Vias-Boas (2005) and Deslandes, Fournier & Rousseau (2005), explored similar issues focusing on primary school children in Portugal and Quebec, respectively. If parents and teachers share these expectations it might be more probable for them and the schools to find effective answers to the dropping-out phenomenon; however, if they do not share them, maybe the problem could not be controlled easily, or maybe it could even increase. In that case, effective strategies to promote school-family partnerships should be encouraged.

The findings obtained in this study indicate that there is an extensive number of issues related to parental involvement in their teenagers' at-risk of dropping out of high school, on which parents and teachers disagree significantly (ten out of twelve). These are issues related to home conditions for personal and academic development of the children, intellectual and academic expectations on the teenagers, and family dynamics regarding school work. In most of them teachers showed lower agreement than parents do regarding the latter's involvement in the education of their teenagers. Similar findings were obtained by Adams and Christenson (1998) and Deslandes, Fournier & Rousseau (2005). In a study performed by the latter in Quebec comparing parents' and teachers' mutual trust in primary school, results indicated that parents have greater confidence in teachers than teachers do in parents; this being so independently of the parents' socio-demographic characteristics considered in the study (parents' gender and education level, family structure, children's gender and primary grade level).

In our study, this finding might indicate that parents feel more assertive in the way they are involved in

their teenagers' education than teachers perceive them to be. These data confirm those obtained by Christenson & Sheridan (2001) and Deslandes, Fournier & Rousseau (2005), who claimed that parents must make greater efforts than teachers to prove themselves.

Maybe parents overvalue their own implication, or maybe teachers undervalue it. In both cases it might mean they do not communicate with each other effectively. This may lead to parents' and teachers' confrontation when talking about the difficulties these teenagers at-risk of dropping out face, which, in turn, may affect negatively both parents' and teachers' willingness to communicate with each other and to build effective partnerships. Similar conclusions were pointed out by Vias-Boas (2005) on a study carried out with focus groups with parents and teachers of students attending different educational levels in Portugal; participants were concerned about the parents' interest in their children's education and undervalued their role as educators; some complained that most parents didn't respond to the school efforts to involve them.

Thus, it seems necessary for teachers to carefully listen to the parents so as to better understand their family dynamics regarding school work. On the other hand, parents should inform teachers about their efforts and the ways they follow to help their teenagers to improve their academic performance. This will allow teachers to better understand the difficulties parents face regarding this matter and to support them to increase their efficacy, particularly when talking about encouraging studying skills and homework.

In this way, teacher-parents conferences and tutorials should concentrate more often in strategies to support

parents and not only on discussing the negative aspects of the teenager, such as poor school achievement or misbehavior. Also, parenting programmes to improve the curriculum of the home for parental involvement are recommended (Martínez-González 2011), as well as other measures to promote school-family partnerships as suggested by Epstein (2011), Henderson, Mapp, Johnson & Davies (2007), Hiatt-Michael (2001), Martínez-González & Paik (2004), Martínez-González, Pérez-Herrero, & Rodríguez-Ruiz (2005) and Redding (2000, 2005). All these strategies may act as potential school innovations to reduce dropout rates.

Besides, individual and personalized interventions from educators and other caring adults which provide social and emotional support for learning are also encouraged. For example, helping students understand they need to gain competences and the high school diploma for future employment opportunities; supporting them to look for educational goals, and to think about their future transitions. Consequently, academic institutions need to adapt themselves to better respond to all learners' needs.

Limitations and suggestions for similar further studies

It is important to note some limitations of this study in order to increase the quality of further ones on the same topic. First, the data are based on information provided by the parents and the teachers themselves, which might add subjectivity to the results and the conclusions stated. Second, the study is focused only on three schools; nevertheless they were selected according to the criteria set suggested by the international research literature on the topic. Finally, the size of both the parents' and the teachers' samples is small due to the specific dropping out topic under

research; yet, 61 families taking part in a study regarding this issue can be considered fairly acceptable since, fortunately, the number of these students at schools is much lower than their counterpart.

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CHAPTER 9

TEACHERS' REFLECTIONS ON PARENTAL INVOLVEMENT IN EMERGENT LITERACY DEVELOPMENT IN RWANDA

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Abstract

The present study examines the reflections of teachers in nursery and lower primary schools on parental involvement in emergent literacy with the overarching aim to gain knowledge on developing children's emergent literacy in Rwanda and other countries with similar challenges. It is indeed only of recent that early childhood education policies which acknowledge emergent literacy and prioritize nursery education have been introduced in the Rwandan education system. Qualitative data were collected via an open ended questionnaire and in-depth interviews involving 24 participants, including 13 teachers of nursery schools and 11 teachers of lower primary schools from both urban and rural settings. The findings indicate that teachers in nursery

and lower primary schools generally emphasize the necessity of involving the parents more in the creation of a conducive environment that nurtures the children's emergent literacy. At the same time, the study suggests that the emergent literacy development is a shared responsibility translated into a teacher-parent partnership for children's success at school.

Keywords

Parental involvement; emergent literacy; nursery school; lower primary school; early childhood education

Introduction

The early childhood education policy in Rwanda is among the many education policies that have been put in place over the past 17 years in order to spearhead early childhood education in families and communities. According to Bigirumwami (2004), the traditional early child education emphasized the child's physical, social, and mental development through games and plays, social interactions, storytelling, words of wisdom, proverbs, and riddles. This is echoed in Erny's (1981; 2005) analysis of the transition from Rwanda's indigenous education to modern times. He also stressed the separate education reserved for both males and females. With the emergence of school in early 1900's and later during the colonial and post-independence era, this child rearing ideology did not change at all although some school literacy has been slowly introduced in some literate families (Erny 2005). Today, the Ministry of Education [MINEDUC](2011) aims to improve parents' knowledge and skills in child development and rearing as they are the child's first teachers to ensure that all children, infants and toddlers, are prepared for success at school and in life and are ready to begin school at the correct age. Efforts are put on sensitising local authorities, opinion leaders, parents, communities and the civil society about the

importance of children's early literacy development. This will contribute to responding to a critical need in literacy for the whole population so as to reach the universal goal of education for all (Ministry of Finance and Economic Planning [MINECOFIN] 2007).

In its commitment to improve the education system and offer quality standards and relevant basic education for all, MINEDUC (2009, 2011) calls on parents and guardians to be partners in education. Indeed, many parents still believe that schools and teachers alone are responsible for their children's education and the source of all knowledge and skills. In addition, parents do hardly have any idea of what to do and how to stimulate their children at home to be ready to learn when they enter school. There is also what they probably do without being aware. Therefore, early literacy development issues are worth investigating as they constitute a key to successful literacy and education for all campaigns underway (MINEDUC 2009). They also constitute a bone of contention among education stakeholders, i.e. parents, pupils and students, teachers and political authorities with regard to the rhetoric of low literacy levels and a poor reading culture among Rwandans in general (Ndikubwayezu 2009 ; MINECOFIN 2007). So, this study makes the assumption that it is a vital undertaking to hear from nursery teachers as they are the first ones to meet the children and have expectations about what kind of literacy skills they bring to school. The same applies to primary school teachers in Rwanda, since only very few children have access to nursery education (MINEDUC 2011). Many children, mostly from rural areas, start primary school without attending nursery education. Thus, it is important to investigate this issue from teachers' point of view as they work very closely with young children freshly leaving home.

Research conducted in emergent literacy development for young children in the USA, UK, and Australia has shown that children's literacy skills develop and increase faster when they receive consistent literacy experiences at home and in school (Heath 1983; Teale & Sulzby 1986; McLane & McNamee 1990; Anderson 1995; Purcell-Gates 1996; Stainthorp & Hughes 2000). So, there is no better place for children to begin their literacy journey than at home. Even though the responsibilities for children's success in literacy are shared between parents and schools, Smit, Driessen, Slegers and Teelken (2008) believe that the prime responsibility rests with the parents. This is also the position of Bastiani's (2000) and Epstein's (2001) studies on the contribution of parents to school effectiveness and partnerships between the school, family and community respectively. They reached the conclusion that parents are in a better position to prepare their children for school, guide and teach them, as well as create a pedagogical climate that is conducive to the children's learning and good behaviour at school.

This study is anchored in the theories of literacy development within the perspective of emergent literacy theory (Teale & Sulzby 1986; Tracey & Morrow 2006). Emergent literacy refers to the earliest phases of literacy development, i.e. the period in a child's life between birth and when the child can read and write at a conventional (approximately third-grade) level (Teale & Sulzby 1986; Tracey and Morrow 2006). This period is characterized by opportunities provided by the child's home environment that engage the child into meaningful literacy activities and skills such as print motivation and awareness, letter and vocabulary knowledge, phonological awareness and narrative skills. The emergent literacy perspective suggests that there are continuities in children's literacy development between early literacy behaviours and

those displayed once children start to read independently. In this process of literacy development, young children are initiated to playing active roles in constructing their own understanding of the world through exploration. In this regard, the emergent literacy theory claims that literacy development begins before children start formal instruction in elementary school and parents have a powerful influence on children's literacy development (Teale & Sulzby 1986; Strickland & Morrow 1989; Neuman & Roskos 1997; Tracey & Morrow 2006). In their influential book *Emergent Literacy: Writing and Reading*, Teale and Sulzby (1986) state that a comprehensive research focusing on literacy learning in very young children has been carried out and has reached a conclusion that "it is not reasonable to point to a time in a child's life when literacy learning begins. Rather, at whatever point we look, we see children in the process of becoming literate, as the term emergent indicates" (p. xix).

This study seeks to examine nursery and lower primary school teachers' reflections on emergent literacy with the purpose of gaining knowledge on developing emergent literacy for young children in Rwanda and other countries with similar challenges. Terms of nursery and lower primary school are used throughout this study following the ones used in the Ministry of Education's (2009, 2011) documents on quality standards in nursery education and early childhood development policy, respectively. To achieve this aim, the following questions were formulated (1) what are teachers' opinions about literacy knowledge children possess when they start nursery and primary education? (2) what do teachers claim can develop children's early literacy and reading habits in schools? Although this is a small scale study, I believe that its findings can be useful in creating a viable ground to

enhance early childhood literacy development opportunities by highlighting the challenges of and possibilities for developing emergent literacy in Rwanda.

Role of parents and schools in children' literacy development

Research has demonstrated that parents are the prime sources for early literacy development and inculcation of good reading habits among children, thus making them avid, willing and responsive readers through interactions with them in the first months and years of life (Bettelheim & Zelan 1981; Morrow 1995; Spreadbury 2002; Paratore 2005; Paratore, Cassano, & Schickedanz 2011). Similarly, studies on ways in which children experience and learn from home literacy practices have demonstrated that the availability of richer literacy materials at home, the family's beliefs in literacy as well as the exposure to literacy modeling by adults relate to the child's literacy development (Dickinson & Tabors 1991; Dickinson & Smith 1994; Purcell-Gates 1996). Also, Sénéchal and Le Fevre (2002) and Baker (2003), in their studies on the role of parents in motivating struggling readers and parental involvement in the development of children's reading skills respectively, pointed out that the parents' involvement in the children's interest in literacy activities and their own interest in such activities are important factors for the children's early literacy development. These activities, including telling stories to, reading to, singing for children, dancing and other cultural practices, playing, access to books and printed materials are facilitative of later literacy achievement in school (Morrow 1995, 1997; Purcell-Gates 2000; Tracey & Morrow 2006). However, many parents are unaware that the non-assistance to their children to obtain important preliteracy and early literacy experiences constitutes a handicap for their children in the long term (Heath 1983; Klesius &

Griffith 1996). This unawareness is coupled with illiteracy and related poverty problems in the developing world. Although there exist inequalities of opportunities of developing emergent literacy at home, research shows that parents from all walks of life, all economic and educational levels can help create family cultures and environments that encourage their children to become actively literate adults and lifelong readers.

After home, comes school. Schools are privileged places where the sown family seed of literacy will grow. They have great responsibilities for children's literacy development. Martello (2002) claims that early childhood teachers contribute to the building of literacy pathways in the foundational preschool and early school years through good choices of books for reading, shared readings and interactive and elaborative discussions on books. They should ensure that there is continuity between home and school literacy practices. Also, Langer (2004) in her statement on developing a literate mind stresses that beyond the home, the school is the major environment for literacy development. Children go to school with some literate knowledge to which schools add literacy experiences. However, in order to achieve literacy fluency, parents need to collaborate with schools and teachers. This is also advocated by Paratore et al. (2011) in their research on supporting early and later literacy development at home and at school. They attribute children's literacy development problems to the inadequate attention in their early years to various literate behaviours that exert influence on both the beginning and later phases of children's literacy development.

To conclude, I agree with studies on early childhood literacy development which posit that it is necessary to provide information, opportunities, and support for

parents regarding their children's early literacy development and their role as their most important teachers (Anderson 1995; Baker 2003; Bastiani 2000; Morrow 1995; Paratore et al. 2011). This would enhance and foster parenting skills and literacy development for children. At the same time, there should be favourable conditions in the community and in the school environment that create continuity between the contexts of home, community and school literacy practices to foster the child's literacy development. Epstein's (2001) model of overlapping spheres of influence summarizes the role of partner participation in the child's learning and development. The model suggests that the child is the main actor in their education, development, and success in school. As a result, children record success when their families, schools, and communities work in partnership to support their learning. Conversely, lack of congruency between how and what children learn at home and at school can affect their literacy development.

Methods

Settings, participants and design

This study was conducted in 2009 and involved 24 teachers from 3 nursery and 3 primary schools in rural and urban settings in Rwanda. 4 of the schools were public while 2 were private. The choice of the settings was motivated by the socio-economic and educational conditions associated with both rural and urban settings which affect literacy development. The selection of participants was done using convenience sampling techniques as they were determined by their availability and willingness to take part in the research (Bryman, 2008). The study population consisted of 13 nursery and 11 primary teachers, including 15 females and 9 males. After receiving written permission from

the district authorities in charge of education where the schools are located, I visited school principals to whom I explained the research purpose. I was then granted access to their schools, introduced to teachers of nursery and lower primary classes. The choice of those teachers was motivated by the fact that they are heavily involved in the early childhood education in their schools. They play a vital role in the building of children's literacy pathways in their foundational pre-school and early school years. After explaining the purpose of the study to the teachers, they volunteered to participate. I also informed them that their answers would remain anonymous and only be used for the purpose of this study. Their teaching experience varied from 3 to 19 years.

The questionnaire was written in both Kinyarwanda and English. It included open questions which aimed to reveal the teacher's reflections on the children's literacy skills when they come to school, whose responsibility is to develop the children's literacy skills and reading habits, the socio-linguistic environment in literacy education in Rwanda, and the kind of help that parents could provide to support their children. A follow-up in-depth interview was also conducted with 8 teachers to know their expectations on literacy knowledge from children coming to start nursery and primary education as well as literacy skills they would recommend to these children. After a thorough reading and analysis of all responses, I sought for significant themes in the participants' reflections and their discourse from the viewpoint of urban versus rural, nursery versus primary, and their teaching experience was taken into account in the analysis. My selection of quotations was based on the richness of information provided with regard to the core themes. To remain anonymous, the participants were identified as N (nursery), P (primary), U (urban), R (rural), Pt

(private), Pc (public), plus the number of years of their teaching experience.

Findings

During the process of familiarisation with the data, the participants were grouped according to their settings, teaching experience, the status of the school where they teach, and the level (grade) in school. Next, a thematic analysis was done. Three themes emerged from the inductive analysis. These are children's emergent literacy skills, shared responsibilities in children's emergent literacy development, and socio-linguistic environment in literacy education.

Children's emergent literacy skills

According to all the participants, the issue of emergent literacy skills both at home and school is considered as crucial since, as they all point out, children are usually expected to come to school with some literacy knowledge acquired from home. Then to these home literacy skills are added literacy experiences from teachers. Therefore, to the question of how literacy skills in children are when they come to school, the participants' views are analysed along the lines of the divide rural versus urban as well as nursery versus primary school. This is illustrated in the following quotations:

When children come to nursery school, they know very little in nursery I. Some do not even know their names, their parents' names. For some it is difficult to communicate their needs and wants (going to the toilet, for example) (NRPC3).

Many children come here with some knowledge in literacy, but it varies from child to child, for example knowledge of counting, narrating stories, telling the name of their parents and

siblings, holding a book, a pen, use of pencil, crayons, scissors, etc. (NUPt13).

The first quotation demonstrates that the teacher does not seem to focus on what children actually know when they come to school. However, she seems to have specific expectations from 3 year olds when they start nursery school. Beside knowing their identification and expressing their needs, these children are expected to display general knowledge of home literacy practices. In rural areas, many children are used to singing and story-telling together with parents, siblings or grandparents. Also, they are knowledgeable on how to sweep and mind the chickens and have other small tasks in the family. They also play, which is an often neglected form of preparing children for school. In play they learn to follow instructions, negotiate roles and rules, and they learn how to behave to fit into a group. All these experiences are highly valued in their home context where they usually never see anybody reading or talking about school related issues nor have they access to paper, pencils, crayons or story books.

Nevertheless, in many African traditions, there is little interaction between parents or adults and children about what they have experienced during the day at home as opposed to the Western tradition in which family dinner talks are common. This is apparent in both educated and less educated, urban and rural parents at differing degrees. So, considering the background of these children it is very possible to assume that nobody has ever asked them about their name before, leave alone being used to request to go to the toilet. Instead, according to family traditions, most children are looked after by siblings, relatives, friends or a house maid who predict their needs and help them accordingly. Hence, according to the participants, there are discrepancies between children

from rural settings who are less prepared for school and urban children who demonstrate richer emergent literacy knowledge through access to a wide range of literacy tools as well as print awareness and motivation.

A distinctive divide between nursery and primary school teachers' discourse on pupils attending the respective schools deserves to be given some attention.

In general, we find that children who come here straight from their families have few literacy skills related to written language, but rich and developed literacy skills related to oral language. They have little knowledge of papers, books, pens, pencils, etc. (PRPc10).

It is up to the teacher to give a new shape to children. We often feel that children have not been prepared for school literacy skills. They display a lot of weaknesses. We really have hard times with rural children (PRPc12).

Because many children at this school also attend the nursery school here, when they start primary one, they are aware. They can count, write some letters, read them, know stories, their names, their parents' names, place of residence, etc. They are aware of pens, papers, scissors, paint, etc. They are really literate (PUPc11).

From the first two quotations above, the participants point out that children in rural settings who join primary school without prior education in nursery school have little knowledge of print and school as opposed to their urban counterparts who have been to nursery schools. However, they emphasize the rich oral literacy found in children from rural settings. In the third quotation, the participant is clear on what she expects from children entering primary education.

Nursery education is indeed not yet common and accessible in Rwanda's rural areas although efforts are being made to involve grassroots authorities and parents to establish nursery schools at Cell levels. The Cell is the lowest administrative entity which is also the closest to the population. At the same time, the teachers in both urban and rural primary schools laud the achievement of nursery school and acknowledge its contribution in preparing children for school.

Shared responsibilities

All the participants in this study agree that developing early literacy skills and reading habits involves the participation of parents, educators, and the community as a whole. It is a shared responsibility as can be read in the following quotations.

Parents should understand that they are the first teachers and role models of their children in developing early literacy skills and reading habits. Teachers also play a vital role. Therefore, we all need to expose children to early literacy stimulation activities, such as play, singing, storytelling, writing, reading, etc. Children always tend to imitate what their parents and teachers do (PUPt19).

Parents, teachers and the community at large have this duty. But many parents do not think they are concerned, children are left on their own. Most home environments are not really supportive in rural households (PRPc10).

All the participants agree that it is first and foremost the parents' duty to develop and foster their children's literacy. Parents are in a better position to ensure and monitor children's growth in literacy and other childhood needs as they spend most of their early years of life together. They should provide for various literacy opportunities. However, as most participants

indicate, many parents do not know how important they are to their children in this endeavour to develop their literacy skills and reading habits or simply do not know it is part of their duties. They think that this duty lies in the realm of schools and teachers. So, they will wait until the child goes to school.

In the second position, the participants stress their pivotal role and acknowledge their great responsibility in the development of children's literacy and reading habits. Teachers emphasize that parents should lay a good foundation for their children and they add school literacy experiences. They concur that children need extensive practice with emergent literacy instruments and a supportive environment both at home and school in order to help them acquire all fundamental life skills. This shared responsibility may turn children into creative and productive adult readers. This shared responsibility is translated into teacher - parent partnership that has also attracted much attention of the respondents in order to foster literacy and reading habits in children as illustrated in the following quotations.

Partnership between parents and teachers is needed, parents should be involved in decision making at their children's school, take part in the life of school to foster children's literacy altogether (NRPC3).

Children's literacy development being a shared responsibility between parents and teachers as well as schools, we should develop a partnership in order to exchange information, monitor and ensure the progress in children's early literacy (NUPt7).

From the above quotations, the participants advocate for parental involvement in what is happening at school. Indeed research (Epstein 2001; Sénéchal & LeFevre 2002; Paratore et al. 2011) has established

links between parent involvement and positive educational outcomes. The close collaboration between parents, teachers and schools allows exchange of information regarding the pupils' progress, which impacts on their literacy development. However, schools have to take the lead in initiating and reinforcing parental involvement. In general, from my experience, most parents will hardly interfere much with school business and teaching activities.

Socio-linguistic environment in literacy education

Most participants pointed to the issue of the socio-linguistic environment in Rwanda as a concern in literacy education. The language in nursery and lower primary education has been indeed unstable with successive shifts from Kinyarwanda, French, English, and to Kinyarwanda again. In their view, this problem affects the performance in literacy of all education partners, namely parents, children and teachers. This is illustrated in the following quotations.

Today the language of instruction is a very big challenge for children's literacy development and reading habits development in Rwandan households. The language in use between parents and children during plays, talks, assignments, homework, reading, is not the same as the one at school with teachers (NUPt13).

Although we are being trained in teaching through the medium of English, we cannot say that we can teach children well because the training so far given is not enough. We are not confident in the language. Many parents are also embarrassed by their children when asking them to help with homework or course explanation in a language that they do not know (PRPc10).

From the above quotations, the participants are convinced that the issue of language in use in households on the one hand and in schools on the other is crucial for literacy growth and rapid knowledge transfer. Kinyarwanda, alongside French have been used as the media of instruction at nursery and lower primary school levels. Since 2009, English has been adopted and introduced as an exclusive language of teaching and learning at all levels of education including nursery and lower primary schools. The great majority of teachers and parents who are supposed to implement these changes have a French speaking background inherited from the colonial legacy. This is why the participants feel that both the teachers and parents get embarrassed when they are called to teach, explain and help the children to learn in a language they are less conversant with. The participants point to different literacy practices in which parents used to assist their children, but which they do not do or badly do simply because they do not understand the school language. These include assignments, homework, and reading.

Although most participants speak of the in-service training in English they have been to and are still being offered, they describe the language training process as a challenge since they cannot be fluent and able to teach via the medium of English overnight. They are not confident in front of their pupils. This is a real challenge indeed because it is a gradual process to learn and acquire a foreign language. However, according to some other participants, especially those whose teaching experience ranges between 3 and 10 years, they express hope for improvement given the practical measures taken by the Ministry in charge of primary education to address the linguistic challenge. This is illustrated in the following quotations.

Since the adoption of English as the sole medium of instruction in education, we have been

struggling to learn and refresh our knowledge in English through refresher courses. We are facing some difficulties for now, and so are our pupils because we are not yet competent in the language (NUPt5).

The working / teaching / learning conditions for teachers, pupils, and parents are not easy. There are many problems related to language of instruction in education. But I hope maybe after some years they will be over (NRPC3).

This rather hopeful discourse by less experienced teachers is attributed to the fact that though they have had French as a language of instruction throughout their schooling, English was also emphasized. In fact, since the late 1990's, the teaching of English as a school subject at all levels of education has increased as the country was aspiring to adhere to the Commonwealth and the East African Community where English is the official medium of communication. Therefore these francophone teachers have had some exposure to English, though not enough to fully perform in a solely English-oriented classroom.

The same hopeful discourse is also noticed among participants from the private English-speaking schools as expressed in the following excerpts.

Today the socio-linguistic environment in literacy education with English as an only medium of instruction in schools is a challenge to many people in families because of their French linguistic background. This school is already using English, and our pupils try to cope (NUPt4).

We do not have serious difficulties because classes in this school have always been run in English since the establishment of the school.

There are some parents who find it hard to help their children with homework and different tasks assigned to them because of the language. But in general we are satisfied with the school achievement (PUPt14).

Even though these teachers realize that their situation is far better, these last quotes demonstrate the complexity of the socio-linguistic environment in Rwanda's educational sector. The language issue in the school and home is problematic.

Discussion and conclusion

The purpose of this study was to examine the reflections of nursery and primary school teachers on emergent literacy with the purpose of developing children's emergent literacy in Rwanda and other countries with similar challenges. The study has identified similar positive perceptions and some concerns among the teachers from nursery and primary schools in both urban and rural settings towards children's emergent literacy development. The teachers expressed the need to enhance emergent literacy in Rwandan families by providing opportunities with a stimulating literacy environment and a strengthened and concerted partnership between schools, teachers and parents.

One goal among many in the policy on early childhood development (MINEDUC 2011) is to empower parents and the community with the knowledge and skills to support their children's early literacy development in order to make them ready to learn when they enter school. The findings obtained in this study point out the need to provide Rwandan families, regardless of the rural and urban divide, with information on how to use available home literacy practices. Indeed, in another study on home literacy practices in Rwandan families, Ruterana (2011) identified little awareness on

the parents' involvement in creating a conducive literacy environment for their children. According to the participants in this study, rich home literacy environment should present opportunities for oral and written language development. There can be engagement of children in reading activities, storytelling, playing games, acquaintance with print, in brief, all activities involving language skills like listening, speaking, reading, and writing abilities. Tracey and Morrow (2006), Purcell-Gates (2000), and Morrow (1995, 1997) have also indicated that these activities are facilitative of later literacy achievement in school.

Another highly rated goal in the early childhood development policy is to ensure that all children have access to nursery education between 3 and 6 years before formal education. Most nursery and primary school teachers consider it very important to enrol children to nursery education for its potential drive to children's literacy development and preparedness for success in school and life. They claim that children who start primary education straight from home are less literate and skilled in class than their counterparts. However, it is only of recent that quality standards and concepts in education for nursery schools were introduced in Rwanda (MINEDUC 2009). According to MINEDUC (2011), only 6.1% of the children aged between 3 and 6 are currently attending nursery school and most of the existing schools are in urban areas and private (90%). While many poor rural communities have taken the initiative to build nursery classrooms, they do not have enough resources or capacities to set up and sustain high quality nursery education, according to the teachers, even though the latter try to design some materials on their own. Therefore, the nursery education is faced with challenges such as costs of salaries for teachers and

materials that are generally covered by communities and parents. However, some faith based organisations and other international organisations such as UNICEF, Care International, and Save the Children intervene and support parents in some rural areas.

Finally, the provision of a strengthened and concerted partnership between schools, teachers and parents is highly valued by all teachers for its potential stimulus for accelerated growth of children's early and later literacy development. Research indicates that parents and community participation in the education of children greatly enhances the impact of schooling and improves its quality (Epstein 2001; Smit et al. 2008). Moreover, close collaboration between parents, teachers and schools is accredited for its presumed positive impacts on children's literacy development. However, this school-family-community partnership is not at all easy to create and maintain. Christenson (2004) in her study on family and school partnership points out that there exist uninvolved parents who impede the family-school connections. In Rwanda for example, many parents distance themselves from their children's education as long as they pay school fees for their kids (MINEDUC 2009, 2011). Although parents' committees also exist at some schools, they are only operational in urban and private schools and almost inexistent in rural ones. Hence, the teachers have the feeling that, with information and improved communication between parents and teachers, they can get more support from the parents and get more and more parents involved into literacy activities.

To conclude, inspired by the early childhood development policy and quality standards in education for nursery schools in Rwanda on the one hand, and what is actually taking place on the ground on the other, this study raises important concerns about emergent literacy development in families, nursery

and lower primary schools. From the findings of the study, the participants expressed the need to sensitize parents and the community, and provide information on and awareness of their role in creating a rich emergent literacy environment for their children's literacy growth at home. Additionally, links and collaboration between parents, families, and teachers need to be strengthened so as to promote, foster, and enhance the much needed emergent literacy for children both at home and at school. However, what is offered is in this chapter is one side of the story, therefore a further study needs to address this issue with the parents' views so that they are included in policy development around young children's emergent literacy development.

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CHAPTER 10

HOME-SCHOOL AGREEMENTS IN ENGLAND: SYMBOLIC VALUE AND CONTRACTUAL RELATIONSHIPS BETWEEN SCHOOL MANAGERS, PARENTS AND PUPILS

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Abstract

In England 'every governing body must have a home school agreement... Copies must be given to all parents ... asking them to sign a declaration that they understand and accept the agreement' (ISCG, 2007, p. 142). There is no legal obligation for them to do so, but a majority of parents and pupils from as young as four years old participate. The chapter uses evidence from case studies to evaluate current practice. It argues that home-school agreements can be read symbolically in terms of the shaping and redistribution of power within schools as carceral organisations (Foucault); as influenced by social contract theory that often makes similar assumptions about human subjectivity and the poverty of trust in social interaction (Hobbes); and as part of shifting cultural practices that currently augment law-based forms of social management in advanced industrial settings (Habermas).

Keywords

Relationships; trust; asymmetry; disciplinary power; social contract; juridification

Introduction

In state-maintained schools in England 'every governing body must have a home-school agreement. Copies must be given to all parents... asking them to sign a declaration that they understand and accept the agreement' (ISCG, 2007, p. 142). Its specific content is the formal responsibility of the governing body who are obliged 'to consult all registered parents of pupils at the school' before adopting or revising it (DfE, 2012a). In principle the home-school agreement is tripartite, made up of school, parents and pupils. It will vary in content from school to school and differs from 'parenting contracts' that are imposed by a court to secure 'an improvement in the child's attendance and behaviour' (DfE, 2012b). Both, however, are contractual in nature (see Bastiani, 1996, p. 9) for they make explicit what the various parties are obliged to do or are responsible for, and imply that there would be recriminations should there be deviance. The Office for Standards in Education (OFSTED) describe the purpose of the home-school agreement as 'a statement explaining the school's aims and values; the school's responsibilities; the responsibilities of the pupil's parents; and what the school expects of its pupils' (OFSTED, 2011, p.8).

For example, primary school agreements often request that children promise to be 'respectful'. The child is expected to sign and so become obliged to 'take care of other people's belongings and not take anything without asking first. I will walk inside the school buildings. I will show respect for other people'. Similarly, parents will sign their part of the agreement and by so doing promise that 'our child will arrive at

school on time, properly equipped and appropriately dressed according to the school dress code. We will show respect for all members of the school community'. The school seals the compact with the promise that 'We will provide a happy and secure learning environment. We will show respect for all members of the school community'. There are also additional obligations associated with 'partnership', 'kindness', 'learning', 'communication', and so on. Secondary school agreements are similar and often include the exchange of promises about 'what the student should expect' and 'what the school should expect'. Students, for example, are expected to ensure that 'deadlines for assignments must be met' along with 'attendance at all your lessons', the maintenance of 'a mature attitude', and so on.

The home-school agreement came into being during former Prime Minister Blair's government as part of a wider offensive on 'irresponsible parents'. Their policy, *Every Parent Matters*, said that 'parents unwilling to accept help and fulfil their responsibilities must be compelled to do so' (DfES, 2007, para. 4.28). This 'responsibility agenda' became progressively more strident towards the end of the decade so that by June 2009 the Secretary of State for Children, Schools and Families warned: 'Once their child is in school, the parents will be expected to sign the agreement each year and will face real consequences if they fail to live up to the responsibilities set out within it, including the possibility of a court-imposed parenting order' (DCSF, 2009, p. 3. See also Gibson & Simon, 2010). Such 'real' threats are indicative of the political backdrop to the nature of home-school agreements at the time but in fact amounted to little more than ministerial bravado for the parental and pupil signature has remained voluntary till this day and without legal teeth: 'Any breach of the agreement will not be

actionable through the courts; no pupil can be excluded because a parent refuses to sign the agreement; no pupil can be refused a place because a parent refuses to sign' (ISCG, 2007, p. 142).

Research on home-school agreements is sparse, now dated and often insufficiently interpretative. Blair and Waddingtons' study on the legal consequences of contracting with parents concluded that: 'The rhetoric of choice and partnership is used as a smoke screen for control and discipline and the imposition of a model of 'good parent' is being superimposed over the ordinary obligations that all parents share' (1997, p. 30. See also Crawford, 2003). Vincent and Tomlinson argued that 'contracts have become... a mechanism for enforcing school discipline' and 'contain an inherent social class bias' (1997, p. 369). Hood suggested that home-school agreements were underpinned by implicit and dubious models of parents as 'problems' and as 'consumers' (Hood, 1999, p. 427) and her identically named paper two years later lent 'little support to the government's view that home-school agreements w[ould] provide a framework for improved partnership between parents and schools' (Hood, 2001, p. 7). From her limited survey of agreements in four inner-city schools, Sykes concluded that 'parents and children overwhelmingly expressed that they thought home-school agreements were useful and helped to enhance trust' (Sykes 2001, p. 273). Such conclusions are contestable, however, in the light of evidence from Coldwell and colleagues in 2003 whose investigation into 360 schools found that 'in almost all cases, the parents interviewed had a very low level of awareness of the home-school agreement' (DfES, 2003, p. 81). The corpus is thus limited not only in terms of quantity but also in its interpretation of the cultural and political significance of the ascent of home-school agreements in England.

This chapter does a number of things. It seeks to explain tensions in the nature of a non-obligatory requirement for schools to obtain parental and pupil signatures; to raise questions regarding the nature of symmetry and mutuality between parties in the construction, implementation and consequences of the agreement; to query the authority and capability of pupils as young as four to challenge the content of an agreement or presume their loyalty to; and to understand broader issues concerning the nature of interactions between schools, parents and pupils and how home-school agreements symbolise a shift in cultural assumptions and preferences for new types of relationships between actors. The chapter has three sections. The first, on current practices, presents a synopsis of key issues emerging from recent interviews with headteachers, teachers, pupil, governors and parents in four state-run schools. Their narratives and explanations are detailed but limited space here has led to the précising of methodology, methods and content (see Gibson & Simon 2011). The section is intended to survey current practices and attitudes towards home-school agreements in England. The second section interprets the symbolical value of home-school agreements by referring to Foucault, Hobbes and Habermas. Foucault presents schools as carceral systems with disciplinary procedures designed to 'train docile children' and 'supervise the parents' (Foucault, 1977, p. 212). The agreement is arguably central to this project. The seventeenth century English social contract theorist Hobbes is relevant insofar as he encapsulates the way contractualism symbolises the cool, distanced relationships between fearful strangers that simultaneously disregards and displaces the web of trust that tie moral agents to one another in a multitude of complex and composite ways (Hobbes, 2008 [1651]). And Habermas is valuable in explaining

the way in which home-school agreements not only supplement socially integrated contexts but converts them over to the medium of law as part of a wider and damaging shift in contemporary cultural practice (Habermas, 2006). The concluding section reviews home-school agreements in the light of tensions and contradictions within current government policy on schools.

2. Current practices - Case Studies

2.2. Methodology and method

Two primary and two secondary schools were chosen for their variety and locality. All were from the west of England and included a Voluntary Controlled and a Roman Catholic primary, a Community College and an Academy for secondary-aged pupils. In 2011-12 forty-three interviews were carried out, mostly individually although pupils were grouped as were some parents (see Figure 1):

School	
A	Primary (CEVC) 175 pupils, 4-11 year olds
B	Primary (Catholic) 200 pupils, 4-11 year old
C	Secondary (Community College) 1190 pupils, 11-16 year olds
D	Secondary (Academy) 630 pupils, 11-18 year olds
Code:	Interviewees:
A, B, C and D = school	3 headteachers
HT = headteacher	1 vice principal
GB = governing body	5 governors (including 3 chairpersons)
T = teacher	8 teachers
Pu = pupil (Y = year)	8 parents
Par = parent	18 pupils

Figure 1

Interviews were semi-structured, lasted for thirty minutes to an hour and were recorded. These were later transcribed and scanned for dominant themes. Categorisation involved the three groups of respondents that replicated the categories of signatories on home-school agreements, viz. school officials (headteachers, members of the governing body and teachers), parents and pupils (or students). Qualitative analysis of the interviews involved inductive coding by sifting their content for key discursive themes. These were formed in part by the questions asked but also because of the two-way flow of conversation during interviewing and respondents' reactions to supplementary questioning. Once these themes were identified, transcripts were scrutinised more systematically in order to classify similar and consistent responses from across the whole sample. Responses were then used to form sub-headings and paragraph themes, and interviewees' verbatim responses where poignant were incorporated to illustrate the richness and tenor of their utterances.

2.2. The schools' perspective

A number of core themes emerged from the interviews with school officials. Whereas headteachers and senior managers knew about the legal requirements for home-school agreements, governors, including two chairpersons, were generally unsure about whether their pupils and parents *had* a choice to sign or even *if* their school had an agreement: 'I don't know legally what the...' (B-GB); 'I don't know if the Academy has one. I assume that they do. I would need to double check that' (D-GB). Teachers were aware of the home-school agreement but like governors were also unsure of its legal status. Knowledge of the procedures for the construction, revision and monitoring of the agreement was also often vague. We have already seen how current legislation entitles parents to be co-

constructors and yet this did not happen in any of the four schools except indirectly through representation on governing bodies. No home-school agreement had ever been revised or updated since ratification and therefore failed to reflect the new annual intake of pupils or parents, and their wishes, despite the rather amorphous statutory requirement to do this 'from time to time'. When asked why, one governor replied: 'No... No... (laughter)... Although it's a legal requirement we've never had to act on it. It's never been an issue' (B-GB). While schools are obliged to take 'reasonable steps to ensure the parental declaration is signed by school', the monitoring of this was cursory despite pressure to sign within the first couple of weeks of the academic year.

The majority of teachers interviewed were dismissive of the agreement but were under pressure from senior managers to enact the policy. One Reception teacher argued:

The agreement is not 'agreed' by children. We just get them to sign it. I personally would say it's not that valuable. *So why do it?* Because it's a legal requirement. I wouldn't do it if we didn't have to'. (A-T)

One who was more favourably disposed to home-school agreements tried to justify its lack of co-construction and revalidation by parents and pupils by arguing: 'But it *is* an agreement if they (i.e. the parents and pupils) agree to it' (B-T). School staff who oversaw the management of home-school agreements were divided into two camps. On one hand were those who intentionally minimising their time and effort upon it, seeing it as an imposition and superfluous to their functioning as an institution (A, B & D). On the other, one vice-principal (C) justified its worth insofar as it could be used as a fillip to implement other school policies. Teachers entrusted with securing parents' and

pupils' signatures likewise fell into these camps. There were those who were pragmatic in 'getting it done and dusted', as one put it, and those who saw it as functional insofar as it formed the basis of rules for parental or pupil behaviour and was therefore expedient to the school. School governors also vacillated between these two positions for while none spoke enthusiastically of the agreement one concluded:

It is only the school that has any real interest, a statutory one in making sure it has one made. It's not really on anyone *else's* agenda to have one. It *could* be if there was a better engagement with the notion of it and a more widespread understanding of 'agreement' (D-GB).

In sum, schools lived pragmatically with the statutory requirement and manage it at least cost so that the procedural aspects of completing the agreement and acquiring signatures was performed without generating undue tension or overt surveillance. Only in one school (C) did a senior manager value it but this was not for reasons of partnerships with parents and pupils but for expediency in implementing other school policies. Moreover, it belied the lack of monitoring or awareness of teachers obliged to implement it and who were critical or dubious of its value. The other three schools clearly saw it as a procedural necessity ('ticking boxes') and suggested that there were far more constructive and positive ways of establishing relationships with parents and pupils. It is a snapshot of schools' attitudes to the home-school agreement that corresponds well with recent comments from OFSTED:

Home-school agreements had a low profile and their impact on the day-to-day work between parents and the schools was very limited...

Although one secondary school considered that a signing event of the home-school agreement each September created a 'common understanding' between home and school, the headteachers of fewer than half the schools visited considered that this was an important document for their school. They did not see it as driving the school's work with parents and it was seen by some as tokenistic. (OFSTED, 2011, p. 5 and 8)

However, what OFSTED doesn't offer is an interpretation of broader issues concerning collegiality, levels of mutuality, the autonomy of school actors, questions of loyalty, the power of various actors, and so on, nor an interpretation of the political assumptions that maintain the legal requirement for home-school agreements to this day. We come to these questions later.

2.3. The parents' perspective

The first theme that emerged from parent interviews was a general sensitivity to the school's predicament, often appearing to be both sceptical of the value of home-school agreement but sympathetic towards the school in pursuance of its duty to enact a statutory obligation. One group of loyal parents reported that their children's primary school was simply:

...ticking the box... ticking boxes. That's all they're doing. Doing the bureaucratic thing the government say they have to do. In many ways they haven't got time to sit up and say '*I'm terribly sorry this is not the right thing for this school*' because it takes so much more effort to do that. It's a lot easier to tick the box and get it out the way. And that's not because they necessarily want to do that, it's just that changing something in that situation means taking time away from educating the child. Teachers don't have time for that. (B-Par)

The reasons parents gave for signing or not signing the agreement fell into four categories. *Refusers* objected to the idea of it per se, although the distinction between a 'principled parent' (who refused to sign on principle) and a 'difficult' one (who might be cast as 'irresponsible') would be difficult for a school to assess without subsidiary knowledge. *Forgetters* said they simply overlooked signing despite reminders from school but for whom it was clearly an unimportant or irrelevant event. *Active signatories* were those parents who believed the home-school agreement to be worthy of support. And *reluctant signatories* were those who disliked the procedure or saw it as externally imposed upon the school and yet took what one described as a 'trivial' stand ('I choose my battles carefully') by signing for fear of not being seen as a 'good parent' or concern for embarrassing their child.

The nature of reluctance and complicity make this a particularly interesting group. Schools generally had not discerned a distinction between reluctant and active signatories (both of whom end up signing) or between noiseless refusers and forgetters (both of whom end up *not* signing) and the implications this might have for home-school partnership. One school governor suggested that parents 'have the right to say 'I don't want to sign this'... but I've no awareness of anyone... refusing to sign it' (B-GB). The headteacher of the same primary school was more circumspect:

They (parents) can refuse to sign it. I *believe*. Obviously it's in our interests to know why. To be very very honest in our school we've never had parents who have been unwilling to sign it... If one refused our position would be that we'd need to talk it over with the parents to find out exactly what the issues were. (B-HT)

Many parents remarked that there was both explicit and tacit pressure to comply and sign. This came home in the form of reminders (School Newsletters and verbal prompts from the child) that were viewed as pressure to conform to what one called 'the good parent syndrome' or the wish for the school to recognise the home as responsible: '*So why did you sign? For support really... I can justify why*' (D-Par). Signing formed part of a flurry of activity at the start of the academic year, especially as new groups of children started school in Reception (primary) or in Year 7 classes (secondary), and formed part of the initiation ceremony of entering the institution. A secondary governor suggested that it was often an automatic and unquestioned response to a request from the school to a mindless process that was performed by parents unreflectively: 'Just another obligation placed on parents like their children turning up in uniform and turning up on time' (D-GB). Often parents confirmed that they had signed because of 'form overload' at the start of term and 'to get the paper work out the way' (C-Par) or 'for the sake of a signature' (D-Par). When asked if the home-school agreement was not, therefore, taken very seriously one parent answered: 'That's right. A lot of parents would probably not pay attention to what was on the form and send it back. I have been guilty of that with the others at primary school' (D-Par).

The group of *reluctant signatories* still opted to sign despite qualms about the idea of the home-school agreement:

I don't think it's worth bothering about... dropping your...umm...you know... the child into it by not signing it. You obviously want to toe-the-line a bit on this one. It's not worth putting pressure on... to rock the boat in the first few weeks of term. That to me seems like common sense anyway... That's what I mean by it's not

worth worrying about. Because I wouldn't want to use my children as my tool...to be one of those parents who says I don't particularly want my child to do this, that or the other. I'd rather deal with it myself. (C-Par)

The same parent suggested that because places were limited and the school oversubscribed, home-school agreements had also been used as 'a control mechanism': '*But who's in control?* I think the school. We're oversubscribed. As I say, any student who doesn't 'toe-the-line'... they make it very clear that there are other people that would like to take their place' (C-Par). Others said very much the same thing: 'I think that... well... parents *will* sign because they want they their children to come here so much' (B-T). The few parents who actively *refused* to sign included a chair of governors who argued vociferously that the agreement was actually a list of expectations:

I wouldn't want to call it an agreement. It's almost like a list of expectations ... what's expected... agreed expectations... It's like making it seem really like a legal document and that you're signing your name to it so that you'll comply with it. It puts people like me off signing the thing, if you see what I mean. (A-GB)

And yet, despite her worries, she suggested that she *had* signed her older daughter's agreement at secondary school because of pressure from the child. She differentiated her actions because as a governor she felt more secure in the relationship she had with her younger child's primary school. It is a case that demonstrates well the delicate judgements parents make in refusing to sign in one context but not in another, or in choosing to sign the agreement despite worries about its form and content.

There are, then, a complex set of values in tension that underlie the nature of parental compliance. A small number saw it as providing clarity for school procedures and providing expectations to them as parents, that may be connected with issues of social class (see Vincent & Tomlinson, 1997; Gerwitz, 2001). The majority saw it as a tolerable, and what one called an 'inexpensive', part of entry-membership into a school they valued. Only a handful were decided non-signatories. What is significant is that all the schools were unable to differentiate between reluctant and involved signatories both of whom ended up signing, or between noiseless forgetters and energetic refusers who end up *not* signing. This has implications for home-school relationships. Only the senior management in both the primary schools clearly indicated that they valued other less legalistic channels of communication so that they could assess the attitudes and reactions of wary or unhappy parents, a point to which we return.

2.4. The pupils' perspective

Two related issues emerged from interviewing pupils. The first centred on the consequences of their non-involvement in the construction and revision of the agreement and the second upon the degree of pressure they felt to ratify it. One fifteen-year-old described it as 'a one sided agreement in a way. We agree to do what the school wants us to do but they won't let us do everything that we want in return' (D-Pu). A seventeen-year-old similarly suggested that:

Agreements are a bit unclear. It keeps coming up but... *uniform!* Sixth formers are supposed to dress 'smartly'. But you can't put down rules which actually say what is smart. One teacher interprets it one way. Then another comes along. (D-Pu)

One teacher called this the 'fluffy' problem, as we later see, that encapsulates the problem of ambiguity and interpretative struggle regarding the meaning of what has supposedly been agreed. An issue here was the age and maturity of pupils. In one primary school, a ten-year-old reflected back upon his time in Reception when he was not yet five and described the problem thus:

You sign it in Reception but now in Year 5 or Year 6 you read back and you think, well now... Now I'm *this* age I *don't* actually want to sign it but you can't really undo the signing... When you're young most of it will seem *utter gibberish*. In Reception they don't know what they've agreed to. (A-Pu)

Teachers and parents of reception-aged pupils in both primaries also saw the difficulty of asking children as young as four to sign:

I don't think that Bradley would have been able to write it. So... you know. He couldn't write his name at four. (B-Par)

I think at four, to be quite honest with you, they will sign it if they are asked to by their teacher... because children do what they're told generally. (B-T) They'll sign anything. But at four if asked to sign it by teachers they will do so. Not 'forced' to sign. But 'will'. (B-T)

For me, personally, it's absolute nonsense. (B-T)

A four year olds signature? Looking at it as a contract... well let's face it. The child will write that because an adult says to them 'just do it'. (B-HT)

So why get them to sign it? Yea I wonder that sometimes. Lots of them can't write their name at that age. (A-T)

At the other end of schooling, one sixth-form tutor suggested that the insistence of a signature from a student could 'jeopardise delicate relationships' (C-T). Parents too were sensitive to the nature of pressure upon pupils from the school for conformity when the cost of not signing was 'falling out with their tutor over something they're going to have to do anyway':

From the perspective of a parent they can't just be chucked out for not bringing the right equipment. But if you're an eleven year old you'd be very worried if you hadn't brought this (agreement) in. I've certainly bumped into children who are in floods of tears because... you know... they've forgotten their pencil. They see this as some sort of a threat if they don't sign it. (C-Par)

In sum, while there is no legal obligation for pupils to sign there was evidence from the pupils themselves, as well as from parents and teachers, that there was pressure to do so. One headteacher reflecting upon the practice of securing signatures threw up her hands declaring, 'Ohhh... for *goodness* sake! (laughter)' (B-HT), acknowledging she felt under pressure to obtain evidence of agreement from her pupils but that at the same time she was taking advantage of their lack of understanding of what becoming a signatory meant. In secondary schools too there was general distrust of the process by pupils who felt under pressure to sign by the end of second week of first term and, despite a substantial proportion suggesting they had forgotten, the outcome appeared unmonitored or fairly inconsequential. One parent of a secondary-aged child believed that: 'A lot of students will forge their parent's signatures... A lot of these (agreements) will not actually come out of their bags' (C-Par).

2.5. Asymmetrical undercurrents

What emerges from this synopsis of current practice is that while home-school agreements appear tripartite and equitable there is clear evidence to suggest that they are asymmetrically structured in both their assemblage and implementation. We have seen that it was common for headteachers or deputies to script the agreement and then pass it to the governing body for formal ratification. None of the agreements were recent and one was eleven years old, having been written at the start of the statutory requirement and since then not discussed by staff nor reconstructed with parents, despite the mandatory obligation so to do. In both primary schools, once home-school agreements were completed, they were boxed and stored where they remained untouched. The annual negotiation between teachers and pupils of what were called 'classroom rules' was said to supersede that had been agreed and one teacher admitted manipulating the outcome:

To quote you 'I do twist things a bit' and I just wonder if that would also apply to the formal agreement. So what's its function? You say its function is to encode the school rules. Maybe those rules are set by teachers pretending negotiation then?

I couldn't possibly agree with that...

...but for the record she's smiling (laughter) (B-T)

One sixth-form pupil voiced his concern for the imbalance by suggesting the need for an ombudsman to enact the agreement: 'If teachers failed *their* side of the agreement who would we turn to? We would need a person *outside* the school who'd have to be accessible' (D-Pu). Asymmetry was also found in the

semantic switching of what is commonly meant by 'agreement' to it denoting 'rules':

But then you're surely implying that it's a set of rules... But that's not an 'agreement'?

But it is an agreement if they agree to it.

Is it therefore a one-way 'agreement'?

But if they didn't agree with what's on the paper they wouldn't sign it. It's like a 'set of rules' for behaviour for those entering the school. (B-T)

The pronoun shift ('I' - 'we' - 'us') in the comments by a headteacher below, together with the slippage from 'agreement' to 'contract', are also revealing:

From the parent's point of view I would consider this more of a contract. There are parents we don't see every day. There are parents that we don't see at all... Although it doesn't have huge legal weight with regard to penalty... it's something that is sort of a support to the school. To say 'Well now, look, you *did* sign this'. I think that's actually what you're doing... You're actually giving *rules* to parents. Saying that phrase is quite shocking but *actually* that's what we are doing. You're saying that to be part of *this* school community we need you to share our values and our vision and our... you know... what's important to us. (B-HT)

In consequence, asymmetry was found not only in the procedures for the construction but also in the *composition* or *content* of promises made by each party. Schools reported no example of a parent using the agreement to challenge them for failure to deliver on a specific part of it. One parent said that, because the wording made it so ambivalent and self-evident, 'there's not much they could argue about - 'attend school regularly', 'bringing the right equipment', 'wear

school uniform', 'tidy appearance', and so on ' (C-Par). Similarly a governor talked of the lack of equivalence in outcomes for each party, such that one would never find a school agreeing to guarantee that a pupil reached a certain violin grade, or acquire the requisite exam passes to enter university, or warrant that their child would emerge from school 'literate and numerate':

There is no guarantee that the school *will* ensure that the child is literate and numerate. And I have to say if a kid can't do the basics after eleven years of schooling there is a huge issue within the education profession of a child whose needs are not being met.

And if this requirement were itemised in the home-school agreement?

I would be *inundated* with parents asking why John or Susan had not achieved a 'C' grade in English or achieved a grade 1 maths. They certainly wouldn't accept the appalling 50% of kids failing English and maths. It would make teachers accountable... makes the education system accountable. (C-GB)

Keeping the parental part of the home-school agreement vague was important said one primary teacher. In principle she could see that 'they (parents) *could* use it. But it's not phrased to allow this. It's 'fluffy' for them... and personally you wouldn't want it made too 'un-fluffy'... (laughter)' (B-T1). One outcome was that disciplinary action based upon the home-school agreement only ever emanated *from* the school *to* parents or pupils. One headteacher explained that she had twice referred a parent to the signed agreement that formed a reference point to address their misdemeanour:

The second one was a stepfather...umm... who was very aggressive and threatening and so again we said: 'Look, we've enclosed a copy of your home-school agreement signed earlier this month by your partner that you will show respect for all members of the school community'... We highlighted that bit...and also said that, you know, before any future meeting we'd get him to sign a code of conduct. (A-HT)

When asked post-interview what she would do if the parent *hadn't* signed the agreement said: 'Probably show him the agreement and say something like 'And we note you didn't sign it... (laughter)' (A-HT).

Issues of asymmetry coincide with the impact of the home-school agreement upon the fabric of school relationships. One of the conclusions from the 2003 survey was that a majority of respondents thought they 'had no impact' on schools (DfES, 2003, p. 23). We have already seen that more recently OFSTED has similarly concluded that home-school agreements were not 'driving the school's work with parents and it was seen by some as tokenistic' (OFSTED, 2011, p. 8). This is borne out by the evidence above. However, that they are said to have 'no impact' is ambiguous. For some headteachers home-school agreements are clearly not permitted to impact upon the life of their school in the sense that they are side-lined as efficiently as possible, in much the same way as a computer virus is quarantined: 'The way it stands at the moment at school is that that piece of paper (the agreement) is signed and then that's history... that piece of paper gets superseded by what we do in the classrooms' (B-HT). The same head acknowledged, however, that the agreement had an impact. Because of the importance she placed upon relationships in school, that formed 'a sort of agreement... a contract of trust', she argued that it brought with it a sense of formal legality that 'just muddied the water' (B-HT)

and put delicate relationships in jeopardy. A governor, considering the impact of signage and the surrogate legal obligations that home-school agreements represented, agonised about its effect upon trust, motivation and human responsibility. This he attributed to the political backdrop to its emergence, describing it as 'a very controlling era in social understanding':

My personal belief is that we shouldn't get pupils to sign. This is highly hostile to relationships based on what is genuine rather than obliged. It doesn't change inner motivation... Clearly, we need laws and restrictions to make a society function. We need rules of some kind. But I don't think they function better because you make people sign things so they'll do something... You're no better off. If they agree to do it, but still didn't like doing it, you haven't changed their inner motivation anyway. Surely, what we're seeking to do in a healthy institution is encourage better results, better behaviours, better motivations... Trust is fundamental. You have to give people the responsibility to get it wrong... We've have had a very controlling era in social understanding... Massive erosion of longstanding civil liberties, desperate urge to lock everyone up, criminalise certain behaviours and to restrict people's autonomy... The whole thing is made contractual and top down, which is a very alien notion of society to me. (D-GB)

3. Symbolic Interactions

The rise of home-school agreements in England can be theorised in three ways. First, in terms of the shaping and redistribution of power within schools as carceral organisations 'swarming with disciplinary mechanisms' (Foucault). Second, by way of comparison with a 'social contract' that makes assumptions about subjectivity (or 'human nature') and shared interaction

(Hobbes). And third, in terms of shifting cultural practices that currently augment law-based forms of social management in industrial settings (Habermas). Put another way, Foucault delivers insight into the way home-school agreements can be read as a new technology for delivering discipline and organisational control. Hobbes prompts us to question the assumption that agreements are only dependable if underpinned by contract. And Habermas through the notion of 'juridification' helps explain the cultural significance of home-school agreements as part of the increasing intensity and spread of surrogate-legal attachments.

3.1. Foucault

A Foucauldian interpretation of home-school agreements involves identifying 'disciplinary power', the implications of self-censure and the idea that schools are comparable with any other carceral organisation like prisons, armies or mental asylums. *Discipline and Punish* not only charts the way disciplinary power has been transformed from overt domination to 'modest, suspicious power' (Foucault, 1977, p. 177) over the last two centuries, but how it is now enacted through 'humble modalities' and 'minor procedures'. He suggests that 'disciplinary power...is exercised through its invisibility' (ibid., p. 187) insofar as 'the relations of power are perhaps among the best hidden things in the social body' and function 'permanently and largely in silence' (Foucault, 1990, p. 118 & 177. See also Ball, 1990). He likens disciplinary power to a machine that no individual (headteacher) or group (of governors) is in charge of for, 'although it is true that its pyramidal organization gives it a 'head', it is the apparatus as a whole that produces 'power' and distributes individuals in this permanent and continuous hold' (ibid., p. 177).

The techniques for achieving disciplinary power are threefold. First, through unceasing observation or the insidious 'hierarchized, continuous and functional surveillance' (ibid., p. 176) of inmates clothing, behaviour, disposition, conduct, etc. as contained in prison manuals, asylum regulations and schools' home-school agreements. Second, through the examination, that constitutes a comparative system for 'the calculation of the gaps between individuals' and 'their distribution in a given 'population'' (ibid., p. 190) with the purpose of selecting and establishing 'individuality' and deviance from what is expected. And, third, in the form of 'normalising judgements' that constitute 'that which does not measure up to the rule, that departs from it' (ibid., p. 178), for which there are a myriad of punishments for straying:

The workshop, the school, the army were subject to a whole micropenalty of time (lateness, absence, interruption of tasks), of activity (inattention, negligence, lack of zeal), of behaviour (impoliteness, disobedience), of speech (idle chatter, insolence), of the body ('incorrect' attitudes, irregular gestures, lack of cleanliness), of sexuality (impurity, indecency). At the same time, by way of punishment, a whole series of subtle procedures [i]s used, from light physical punishment to minor deprivations and petty humiliations. It was a question both of making the slightest departure from correct behaviour subject to punishment, and of giving a punitive function to the apparently indifferent elements of the disciplinary apparatus: so that, if necessary, everything might serve to punish the slightest thing... (ibid., p. 178)

From the evidence about home-school agreements there is a plethora of evidence to show the effects of normalising judgements upon 'toeing-the-line'; how the fear of isolation or embarrassment for straying

vies with the threat of punishment for discarding or ignoring it that takes the form of 'petty humiliation' through the establishment of 'confusion... coldness, a certain indifference, a question...' (ibid., p. 178); and how complicit acts of self-censure operate because of the threat of the institution's gaze and the accusation of disloyalty or of reprisal.

The panoply of rules encoded and regularised in carceral organisations are covered in manuals, regulations and agreements. On my computer screen are two documents that use remarkably similar language. The first is an anonymous home-school agreement taken from the web. It talks of '*governing bodies*' and of '*rules and regulations*' that pupils '*will obey*' and that will be '*reinforced*'. It warns that pupils should '*be very aware of the school rules and code of conduct and abide by them*', of the institution's reaction to '*bullying*' and to cases of '*harm and intimidation*' and to the school's intention '*to implement the rules with vigour*' and punish '*those who do not comply*', and so on. It also praises self-disciplined pupils who are self-regulating and '*support a calm environment*' and are '*polite and respectful at all times*'. The other is James M. Winder's *Rules: Prisoner Conduct* from Salt Lake County Sheriff's Office (Winder, 2012). It refers to the need to address staff '*courteously*', warns about the '*use of threatening, abusive or disrespectful*' behaviour, of '*disorderly conduct*' and that '*unnecessary noise is not allowed*'. There are comparative references to uniform, to the consequences of damage to institutional property, to timetabled directives and the need to maintain prison routines, akin to parents agreeing to ensure their children arrive at school on time, in school uniform, acting '*respectfully*' toward members of the school community, and so on. In a section on *The Swarming of Disciplinary Mechanisms* Foucault writes: 'Thus the Christian School must not simply

train docile children; it must also make possible to supervise the parents, to gain information as to their way of life, their resources, their piety, their morals' (Foucault, 1977, p. 211). Training parents not to withdraw children from school during term time is a common trope in the 'agreement'.

3.2. Hobbes

Thomas Hobbes was a contract theorist who published the *Leviathan* in 1651 shortly after the English Civil War. In it he reflected upon a hypothetical 'state of nature' where people lived 'in continual feare, and danger of violent death', where 'the life of man [was] solitary, poore, nasty, brutish and short' and where a state of 'war where every man is enemy to every man' held sway (Hobbes, 2008, p. 86). While Hobbes entertained the possibility that there might be mutual agreement amongst warring parties for self-interested gains, his argument was that 'covenants without the sword are but words, and of no strength to secure a man at all' (ibid., p. 116). In other words, agreements based on mutual consent and trust would not work because, although humans always acted in their own self-interest, they often failed to act rationally. Because of the predilection of human nature to be self-interested and brutal, a condition where no one could be trusted to refrain from stealing or harming another, and because of the unreliability of mutual arrangements, Hobbes was led to the conclusion that only in a civil society, led by a powerful sovereign, would there be peace. The *Leviathan* was the product of that pact, brought into being by what he called 'a social contract' in which individual rights were exchanged for more dependable relationships and security.

The limitations of Hobbes' account of contract parallels apprehensions with its derivative, the home-school agreement. Not only do both rely upon cryptic signs of tacit consent with one-way directives that makes 'consent quite like succumbing to force' (Evers, 1977, p. 193), some have argued that the preoccupation with contracts centre around the idealised *particular* individual that is assumed to be universal:

Hobbes's analysis of human nature, from which his whole political theory is derived, is really an analysis of bourgeois man; that the assumptions, explicit and implicit, upon which his psychological conclusions depend are assumptions peculiarly valid for bourgeois society. (Macpherson, 1973, p.239)

In other words, Hobbes's account of human nature that makes the need for a contract alluring is actually a characterisation of the type of person living at a time of nascent capitalism emerging in early-modern Europe. He thus presents an accurate if unpleasant analysis not of human nature as such but of man since the rise of bourgeois society with his unattractive proclivity for atomistic, self-seeking and mercantile activity. It is the person Held described in *Feminist Morality* (1993) as 'economic man' who first and foremost maximised his own individually-considered interests and entered into contract to do so. It is similarly the man of Weber's *Protestant Ethic* who, with adjudicating and administering procedures at hand to establish the dependable regulation of business, could rationalise his productivity (Weber, 1930).

What 'contract man' fails to do, however, is represent the more subtle links that connect people. This is the place where non-obligatory trust and moral obligation reside. The model of contract cannot adequately represent the relationship, for example, between a

child and those who care for them, be they parents at home or teachers in loco parentis at school. Since such carers are mostly women (see Friend, 2004), Baier argues that contractualism is a model of human interaction founded upon a specious view of human nature and erected by men-philosophers. These she depicts historically as 'a collection of gays, clerics, misogynists, and puritan bachelors' (Baier, 1986, p. 248) who, in choosing to focus upon the cool, distanced relations between more-or-less free and equal adult strangers, ignored the web of trust that tie moral agents to one another in a multitude of complex and composite ways. Contractarians, she says, are like 'the members of an all-male club, with membership rules and rules for dealing with rule breakers and where the form of cooperation [is] restricted to ensuring that each member c[an] read his *Times* in peace and have no one step on his gouty toes' (ibid., p. 247-248). In essence, 'contract is a device for traders, entrepreneurs, and capitalists, not for children, servants, indentured wives and slaves' (ibid., p. 247).

Western society is currently in the grip of contractual thinking (see Held, 1993, p.193). Its attraction lies in its explicitness and dependability. But the escalation of surrogate-legal arrangements between families and school heralds a new kind of relationship where 'rules and regulations' and 'terms and conditions' apply: 'I/we have read the parents' information booklet and I/we agree to all the terms and conditions stated or implicit in it' (Beechwood Sacred Heart School, 2012). The inadequacy of contractual thinking lies in the disinclination to nurture non-explicit relationships that contractarians fail to trust and whose actions they would supplant. Some have argued that these bypassed forms of trust and faithfulness are 'the very basis of morality' (Baier, 2004) that if made explicit

and contractual would end up dissolving social capital still further (Putman, 2000). It is seems likely, therefore, that the current policy to bring contractual thinking from the periphery to the fore in English schools through home-school agreements jeopardises these affective, vulnerable and less formal relationships.

3.3. Habermas

Notions of 'juridification' and the colonisation of what Habermas calls the 'lifeworld' are also germane to understanding the rise of home-school agreements in English schools. By juridification (*Verrechtlichung*) he means the increase in formal (positive and written) law in modern societies in contrast to that based upon custom and convention. Juridification happens through the *expansion* of law, 'the legal regulation of new, hitherto informally regulated social matters', as well as through the increasing *density* of law, 'the specialized breakdown of global statements of the legally relevant facts into more detailed statements' (Habermas, 2006, p. 357). This expansion and densification of law has derived historically from two related sources. First, by the requirement of capitalism to ensure the dependable regulation of business, something Weber had observed as part of the broader sweep of rationalisation in the industrial world (Weber, 1930). And second, through political struggle, that gave rise to 'situational freedoms' or 'freedom-guaranteeing juridification' (Habermas, 2006, p. 361) in areas like employment law that safeguarded limits on working hours, gave protection against unfair dismissal and ensured rights in such matters as union membership, wage bargaining and social security.

Habermas links the idea of juridification with the observation that as the economy and state became more complex as capitalism matured it penetrated ever more deeply into the symbolic reproduction of

what he calls the lifeworld (*lebenswelt*). The lifeworld he describes as 'the reservoir of taken-for-granted, of unshaken convictions that participants in communication draw upon in cooperative processes of interpretation' (Habermas, 2006, p. 124). This is the realm of custom and convention and differs from systems media that view the world in terms of quantities (of money and votes) from which it derives its power. This realm is driven by instrumental rationality (see Gibson, 2011), is unguided by norms and values emerging from the lifeworld and it tends to overwhelm or colonise. Thus, a system governed by instrumental rationality can only ever orientate itself to generating the economic and efficient construction of runways, the technical smartness of identity cards, the effective deployment of troops in combat, or the scientific possibility of genetically modified crops, and so on. Only 'communicative action' originating from the lifeworld can *appraise the qualities of normatively valued alternatives*, namely, the appetite for runways, identity cards, war or GM crops. Because norms and values emerge only from within the lifeworld, its colonisation by systems media has meant the displacement of spheres of legitimacy-generating communicative interaction. The idea of colonisation for Habermas thus explains the surging of instrumental rationality beyond the bounds of the economy and state bureaucracy into areas of communicatively structured life, where, he warns, it is achieving dominance 'at the expense of moral-political and aesthetic-practical rationality' (Habermas, 2006, p. 304-305):

In modern societies, economic and bureaucratic spheres emerge in which social relations are regulated only via money and power. Norm-conforming attitudes and identity-forming social memberships are neither necessary nor possible

in these spheres; they are made peripheral instead. (ibid., p. 154)

The trend towards juridification is allied therefore with colonisation. This is because law is sourced by both the lifeworld *and* by the system. That is to say, *the content of law* can only gain social legitimacy by having its root within the lifeworld where symbolic meanings, values and norms originate: 'They need substantive justification, because they belong to the legitimate orders of the lifeworld itself and, together with informal norms of conduct, form the background of communicative action' (ibid., p. 365). On the other hand, *law as a coercive system* operates as a set of rules and procedures with dependable and predictable processes that stand apart from any particular judgement. Law, then, lays claim to both legitimacy *and* legality, symbolic value *and* power. Problems arise, however, when substantive justification is not possible because the normative or legitimating base upon which law is formed is too weak to engender a consensus because of colonisation. When this happens the source of legitimation transfers from communicative action to systems of procedural correctness. Proceduralism in its instrumentality and legality, however, cannot sufficiently legitimise morality enshrined in law for legal procedures and institutions in themselves have no constitutive power, only a regulative function. In the process swathes of 'technicized and de-moralized' (Habermas, 2006, p. 366) law is relieved of the problem of justification and comes to supplant that which would have formally been taken as un-formalised, consensual social agreement. Habermas warns: 'The trend toward juridification of informally regulated spheres of the lifeworld is gaining ground along a broad front' (ibid., p. 368).

Home-school agreements with their pseudo-legalistic semblance are part of this trend. They have arisen as a consequence of wider cultural movements associated with juridification and colonisation, for schools as social institutions have roots in both the lifeworld and system. As part of *the lifeworld* they act as a primary source of socialisation and norm transference through teaching certain behaviours, moral agendas and values in implicit and explicit ways to both parents and pupils. They can, in other words, be seen as sites of communicative action that draw upon an epistemic 'reservoir of taken-for-granted' that form part of its liberal operating system where talk and dialogue are deemed fundamental (see Mill, 1969 [1859]). It is, for example, currently expected in English schools for teachers, parents and pupils to be *Working Together* (DCSF, 2008), the title of a policy document from central government, and sub-headed *Listening to the voices of children and young people*. In it there is the recommendation that pupils should be consulted 'in connection with the taking of decisions which affect them' (ibid., p. 2). By so doing it implies that they will be engaged in activities that would habituate them to the use of discursive practices to achieve consensual ends, learn the art of accommodation (or tolerance) where consensus is not found, learn to use opportunities for deliberative democracy through school councils, and the like. Thus, as agents of socialisation and communicative action schools can be said to work *within* the lifeworld and orientated (in principle) toward helping communities find consensus on values and normative issues through dialogue.

However, *Working Together* is statutory and thus simultaneously part of *the juridical system*. In England it is supported by the legal-regulatory requirement derived from Article 12 of the UN Convention on the Rights of the Child that schools *must* 'consult with

pupils' and engage them in decision-making (Education Act, 2002, ch. 2, para. 176). For Habermas, where administrative and legal controls do not merely supplement socially integrated contexts but escalate surrogate-legal arrangements between families and school, new forms of relationships are heralded for it 'converts them over to the medium of law' (Habermas, 2006, p. 369). Compliance to ensure that pupils are consulted is inspected by OFSTED who will invoke legal sanctions if necessary (see Education Act, 2005, ch. 1, sec. 7). Juridification is similarly visible in the increasing plethora of formal legal principles that recognise a child's fundamental rights against a school, together with parents, teachers or pupils' rights against local authorities or central government. These are enacted through procedures like Criminal Record Bureau checks, the right of parents to receive written reports of their child, access to their child's school record within a fixed period, legal surveillance of a school's standards, legislation for a specific national curriculum, and so on.

If home-school agreements are part of juridification schools face a paradox. On the one hand, law as a legal system may be thought to protect pupils' and parents' by giving them rights against negligence and malpractice as well as the right to be included in decision making. Juridification may be thought to deliver clarity through measures such as well-broadcasted disciplinary procedures and penalties, through copious welfare directives on health and safety, to legal rights that parents now have to select (or even form) a school of their choice, and so on. However, on the other hand, these legal rights are gained at the cost of increased bureaucratisation that, suggests Habermas, 'penetrates deep into the teaching and learning process' (Habermas, 2006, p. 372). He fears socialisation being broken into a mosaic of legally contestable administrative acts as the

practice of generating still more litigation-proof procedural certainties emerge. Together with the over-regulation of the curriculum it will lead, he fears, to 'depersonalization, inhibition of innovation, breakdown of responsibility, immobility, and so forth' (ibid., p. 372-373). In other words, the paradox of home-school agreements lies in the way in which juridification that promise situational freedoms *simultaneously* involves a formalisation of relationships between families and school that lead to the colonisation of the lifeworld through the prescribed regulation of social interaction.

4. Conclusion

In practice today we have seen that schools get by and deal with the paradox pragmatically. We have seen from the interview data that primary schools frequently ask pupils as young as four to sign the agreement but do so by discharging their legal obligation through stealth and placidity to minimise that which they see as potential damage to the lifeworld of the school. There is also evidence that in secondary schools teachers see the agreement as inhibiting interpretative leeway and the exercise of their professional judgement, such as when a student has evidently transgressed a contractual obligation but when reprisal or punishment is considered too heavy-handed or counterproductive. The paradox is also true of parental transgressions. While we have seen that one school chose to refer to the home-school agreement as a reference point for disciplinary procedures in order to formalise proof of contravention by a parent, there is evidence to suggest that some resist recourse to law, by imposing a parenting order or penalty notice, when a child fails to arrive at school on time or in the appropriate uniform, for fear of the social cost of moving from communicative interactions to legal practices.

We have also seen that the agreement is clearly asymmetrical in its construction, composition and implementation and thus a site of potential struggle (see Jessop, 2012, p. 160-161). Not only is there evidence that the statutory requirement for schools to engage parents in the construction of the agreement is illusory, but parent and pupil voice too is often rhetorical despite policies that would enhance it. Whitty and Wisby suggest that one of the reasons for this is that 'genuine provision for pupil voice requires some power and influence to be passed to pupils, at which point it becomes unpredictable' (2007, p. 4). The unpredictability to which they refer is the epistemic uncertainty of where encounter may roam, a foible of un-policed argument and untrammelled reflection that could lead to *very* different kinds of agreements. This presents a conundrum for schools. While it is recognised that pupils can learn through engagement with the skills, values and knowledge that would make encounter genuine, the ends of an 'agreement' would then be unpredictable for the outcomes cannot be known. However, if pupils and parents are deemed insufficiently knowledgeable or rational, the edifice of voice and the enactment of human rights through consultation collapses.

There is, therefore, a tension between legislating for voice and reaching agreement while attempting to neuter it as a site of potential struggle. This is presumably why interviewees gave no evidence of pupils or parents genuinely engaged in a process of negotiating the content of this ill-named 'agreement' nor using it to seek redress against a school. Because the content of the home-school agreement is un-negotiated, pupils and parents currently seem predestined to hallmark the knowledge-constitutive interests contained by them. Either that or they

connive with schools to render the process instrumental by engaging at levels that are predictable and controllable. In short, home-school agreements seem symptomatic of the decline of trust and the rise of disciplinary power and juridified relationships. For Habermas this is no less than 'a fight for or against the colonisation of the lifeworld':

The point is to protect areas of life that are functionally dependent on social integration through values, norms, and consensus formation, to preserve them from falling prey to the systemic imperatives of economic and administrative subsystems growing with dynamics of their own, and to defend them from becoming converted over, through the steering medium of the law, to a principle of sociation that is, for them, dysfunctional. (Habermas, 2006, p. 371, 372-373)

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CHAPTER 11

HOMESCHOOLING: THE RISING PARENT ENTITLEMENT

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Abstract

Parents are increasingly exerting their rights as primary caregivers and assuming the responsibility of teaching their children at home in lieu of sending them to a public or private school. According to the National Center for Education Statistics (December 2008), the number of homeschooled children increased from 2.2% in 2003 to 2.9% in 2007. Several factors are influencing this increase. These include parental concerns for school safety, distrust in the ability of public or private institutions of learning to instill the skills their children need to compete academically with other children, and parents' desire for religious and moral instruction for their children. Children taught at home, moreover, perform well on achievement tests. This investigation reviews research on the social economic status of the children taught at home, the individual circumstances under which parents choose to teach their children at home, and the child's ability to socially adjust and assimilate into society at the conclusion of homeschooling. The findings indicate that homeschooled children are not lacking in social adjustment.

Keywords

Homeschooling - Parents – Choices

Introduction

Americans traditionally value choices and individualism as important rights. Parents increasingly exercise these rights by choosing the schools for their children. Along with choices of private schools, religious (Protestant, Catholic, Jewish and other) schools, charter and magnet schools; teaching their children at home is an increasingly popular choice.

By definition, homeschooled children are educated at home and their parents are usually their primary teachers. "Homeschooling is a form of education in which children learn at home, with their parents, rather than in a conventional classroom" (DiStefano, Rudestam & Silverman, 2005, 221). DiStefano, Rudestam & Silverman (2005) also stated that home schooling was increasing by 10 - 30% each year.

Teaching the child at home was widespread in the United States until the 1870s with the passage of laws for compulsory school attendance. Since the 1960s and 1970s, there has been a resurgence of home schooling as an alternative to traditional schooling because of dissatisfaction with the traditional compulsory schooling (DiStefano, Rudestam & Silverman, 2005; Lips & Feinberg, 2009; Moore, 2010). More and more parents are assuming the responsibility of teaching their children at home on either a full-time or a part-time basis instead of sending them to a public or private school (Princiotta & Chapman, 2006).

The number of homeschooled children grew from 850,000 in 1999 to 1,096,000 in 2003 (Princiotta & Chapman, 2006). More recently, "the National Home Education Research Institute (NHERI) figures reveal

that around 2,400,000” (Lips & Feinberg, 2009, p. 23) children were educated at home during the 2005-2006 school years, and that the number of children being homeschooled continues to grow each year. According to the Department of Education Statistics (2000), the number of homeschooled children is 4.2 percent of the 56.1 million that are in conventional schools.

It appears that the number of homeschooled children in the United States will continue to increase. These factors include (but are not limited to) school safety, distrust in the ability of the traditional institutions of learning to instill the skills their children will need to complete academically with other children, the standardized curriculum and the parents’ desire to have religious and moral instruction for their children. This paper provides research-based answers about the causes and effects of rising home schooling. Do homeschooled children adjust to and assimilate into society once the home schooling is completed? Do homeschooled children participate in group activities with children outside of their immediate families? Do homeschooled children become productive members of society?

This paper explores answers to related questions. What are political and legal ramifications associated with home schooling? What are some of the requirements that individual states place on parents who teach their children at home? What are some of the opinions of minorities in America, especially those in the African American community, of the homeschooling phenomenon?

Rationale for Homeschooling in the United States

Some parents do not agree with the practice of using a standardized curriculum (Apple, 2006). They believe that it limits the amount of learning.

I just believe children are born little learning machines. . . .What we tend to do in the schools is turn them off. You can't try to open their heads and pour it in. You need to wait for them to ask questions rather than anticipate what the questions will be. We did not do so many minutes of this, and so many minutes of that. (Cameron, October 5, 2011)

This parent explained that she did not force her children into a specific schedule. When her children asked questions such as "What happens to food after it's eaten?" They went to the library to look for books on anatomy and nutrition (Cameron, October 5, 2011). Parents who home school have the flexibility of time and the access to materials that are not usually available to a classroom teacher.

Some of the facts prompting parents to use their right to choose the type of education for their children include the following (Walberg, 2007).

- U.S. schools are behind those of other economically advanced countries in both effectiveness and efficiency.
- By the end of high school, U.S. academic achievement lags behind that of most member countries of the Organization for Economic Cooperation and Development (OECD) – a group that includes most of the world's economically advanced countries.
- U.S. students are not behind in the earliest years of schooling. Their achievement, relative to students in other countries, declines during the years when learning is chiefly the responsibility of schools.

- The National Assessment of Educational Progress (referred to as "the nation's report card") reported in February 2007 that reading achievement of U.S. 12th grade students declined from 1992 through 2005; despite the drop in students' performance, teachers are giving them higher grades" (Schemo, 2007; Walberg, 2007, 2).
- Rising spending has not helped American schools to achieve more (Walberg, 2007).

A prevailing concern to parents (Apple, 2006) is the physical danger to their children, because of stories of school violence. School violence once seen as an urban problem is becoming more prevalent in the suburban schools. Many minorities battle subtle forms of racism in the public schools (Sarver, 2003) or they believe that their children are being subjected to institutional racism (Boyden, Johnson, and Pittz, 2001). Therefore, in many cases, parents of color will home school their children to protect them from the effects of racism in the U.S. school system (Apple, 2006; Fields-Smith & Williams, 2009).

"The concern over school violence, racism and special interests; along with the wider accessibility to tools that make it easier for parents to engage in it has stimulated the growth of home schooling" (Apple, 2006, p. 194). He states that one of the most important tools that encouraged home schooling is the accessibility of the internet to the parents.

Noted African American educators and authors such as Dr. Mwalimu J. Shujaa, the Executive Vice Chancellor and Provost of Southern University in Baton Rouge, are passionate concerning the education of African American children. Dr. Shujaa (1998) supported home schooling and voiced concerns over what he considered the paradox of Black life in a White society. He addressed the negative effect that the system can have on African-American students. He stated that

when he hears an African American person in the U.S. equate schooling with education, he becomes concerned for the cultural future of African Americans. Dr. Shujaa stated that individual success in schooling is often a matter of demonstrating one's ability to represent the interests of the European-American elite. The result is that too many of the best and brightest become inaccessible to the African-American community, because they have experienced too much schooling and too little education.

Too Much Schooling, Too Little Education: A paradox of Black Life in White Societies edited by Dr. Shujaa (1998) prompted Dr. Haki R. Madhubuti to write the following on the back cover of the book.

It is our responsibility as African-American parents, educators and citizens to develop educational settings-- formal and informal --where cultural understandings (political, historical, literary, technological, financial, health, law, etc.) are not transmitted accidentally, but by design.

The study of 24 families residing in the Atlanta, Georgia by Cheryl Fields-Smith and Meca Williams (2009) concluded with interesting results. They stated that with the exception of race, the families in their study looked very similar to most white homeschoolers in that mothers conducted most of the actual homeschooling and often the mothers quit their jobs to home school their children. However, a significant difference between the families was that the parents "do not represent the 'Conservative Right'" (page 384) and 1/3 of the African American children were classified as special needs children. About 79% (19 out of 24) of the parents, especially the parents of African American boys, discussed racial discrimination as an important motivator for homeschooling. These

parents believed that schools placed destructive social forces on them.

The parents belonged to home school groups and sports programs (Fields-Smith & Williams, 2009). Therefore, the parents stated that another advantage of homeschooling was that their children participated in racially integrated settings rather than the nearly all African American environment of the schools.

Lips and Feinberg (2009) stated that according to the Department of Education's National Center for Education Statistics (NCES) specific concerns by parents such as school environment (85%), dissatisfaction with the academic instruction (68%) and a preference for religious and moral instruction (72%) that is not provided in traditional schools were the most prevalent reasons for homeschooling. Dr. Brian Ray (2008), President of the National Home Education Research Institute, lists responses from 7,306 participants who were asked why they home school. Their responses were as follows:

- 79.5% believed they could give their child a better education at home
- 76.7% Cited religious reasons
- 73.5% to teach their children particular values and beliefs
- 69.2% to develop character/morality
- 66.7% Object to what school teaches
- 56.1% Poor learning environment in school

<http://www.brighthouse.com/education/homeschooling/article/s/87123.aspx>

The following data from the 1999 statistics of the National Center for Education Statistics (NCES) shows the number and percentage of homeschooled students in United States (Bielick & Chandler, 2001).

Reason for Homeschooling	Number of Homeschooled Students	%	s.e.
Can give child better education at home	415,000	48.9	3.79
Religious reason	327,000	38.4	4.44
Poor learning environment at school	218,000	25.6	3.44
Family reasons	143,000	16.8	2.79
To develop character/morality	128,000	15.1	3.39
Object to what school teaches	103,000	12.1	2.11
School does not challenge child	98,000	11.6	2.39
Other problems with available schools	76,000	9.0	2.40
Child has special needs/disability	69,000	8.2	1.89
Transportation/convenience	23,000	2.7	1.48
Child not old enough to enter school	15,000	1.8	1.13
Parent's career	12,000	1.5	.80
Could not get into desired school	12,000	1.5	.99
Other reasons	189,000	22.2	2.90

A 2001 U.S. Census survey showed similar results: 33% of homeschooling households cited religion as a factor in their choice. The survey indicated that 30% felt school had a poor learning environment, 14% objected to what the school teaches, 11% felt their children were not being challenged at school, and 9% cited morality (Bauman, 2001).

According to the U.S. Department of Education, "Homeschooling in the United States: 2003", 85 percent of homeschooling parents cited "the social environments of other forms of schooling" (including safety, drugs, sexual harassment, bullying and negative peer-pressure) as an important reason why they home school. 72% cited "to provide religious or moral instruction" as an important reason, and 68 percent cited "dissatisfaction with academic instruction at other schools. Seven percent cited "Child has physical or mental health problem", 7% cited "Child has other special needs", 9% cited "Other reasons" (including "child's choice," "allows parents more control of learning" and "flexibility" (Princiotta, Bielick & Chapman, 2006). Other reasons include more flexibility in educational practices for children with learning disabilities or illnesses, or for children of missionaries and the military.

Apple (2006, p. 195) found that many Christian parents believe that it is God's will for them to educate their children at home. He lists the following as home schooling advantages:

- Parents can present all academic subjects from a biblical perspective and include spiritual training.
- "The fear of the LORD is the beginning of wisdom, and the knowledge of
- the Holy One is understanding" (Prov. 9:10 NAS).
- Home schooling makes quality time available to train and influence children in all areas in an integrated way.
- Each child receives individual attention and has his unique needs met.
- Parents can control destructive influences such as various temptations, false teachings (including secular humanism and occult influences of the New

Age movement), negative peer pressure, and unsafe environments.

- Children gain respect for their parents as teachers.
- The family experiences unity, closeness, and mutual enjoyment of one another as they spend more time working together.
- Children develop confidence and independent thinking away from the peer pressure to conform and in the security of their own home.
- Children have time to explore new interests and to think.
- Communication between different age groups is enhanced.
- Tutorial-style education helps each child achieve his full educational potential.
- Flexible scheduling can accommodate parents' work and vacation times and allow time for many activities (Apple, 2006, p. 195).

Criticism of Homeschooling

Although evidence supports the positive effects of home schooling (Lips & Feinberg, 2009; Ray, 2008; DiStefano, Rudestam & Silverman, 2005; Barrett, 2003; Lines, 2000), homeschooling has also been criticized. Critics, for example, claim that the homeschooled children are not provided with the opportunities of group interaction that is provided by the public school system. Home schooled children lack the interaction and exposure provided by the socio-economic groups, found in the public school system resulting in intolerance and bigotry. They also claim that the home schooled children may be taught by parents who do not have the academic credentials of those teaching in the public school system and are ill informed (DiStefano, Rudestam & Silverman, 2005; Rups, 2005).

In response to the critics of homeschooling, (DiStefano, Rudestam, Silverman, & Rupp, 2005) demonstrate that homeschooled children perform as well or better than other children on standardized tests. They are able to handle the challenges of college as well or better than those who were educated in the traditional manner. In fact, those who were homeschooled successfully attended Harvard, Stanford, Cornell, Brown, Dartmouth and Princeton.

Homeschooled children are usually not only academically proficient, but well socialized, self-confident and do not demonstrate behavioral problems. They participate in many organizations and activities such as 4-H Clubs, scout troops, music and dance lessons, art and drama workshop and plays (DiStefano, Rudestam & Silverman; Rupp, 2005). A National Home Education Research Institute (NHERI) survey of over 10,000 home schooled students found that 98% participated in two or more regular activities outside of the home and 30% worked as community volunteers as opposed to 6-12% of the public school students (DiStefano, Rudestam & Silverman; Rupp, 2005). These children are more socially adapted and productive in their community.

Legal Concerns:

Homeschooling is legal in all 50 states in the United States. *Pierce v Society of Sisters* in 1925 (Cortner, 1975) and *Farrington v Tokushige* in 1927 (Clark, 1955) concluded that the state cannot not force all children to attend public schools or follow a uniform educational curriculum. Later, the court cases of *Yoder v Wisconsin* (1972) and *Perchemlides v Frizzle* (1978) stated the constitutional right of parents to teach their children at home. However, there are varieties of regulations that differ from to state. The regulations differ from being permissive to restrictive

(DiStefano, Rudestam & Silverman, 2005). In some instances in the United States, parents were forced to keep a low profile when homeschooling their children because of the laws of the state in which they were living (Morgan & Allee, 1999). The states regarding regulations seem to fall into three categories (Madison, 2008). There are those that require virtually no regulations, those that have minor requirements and those that have moderate regulations.

Ten states (Idaho, Alaska, Texas, Oklahoma, Missouri, Illinois, Indiana, Michigan, Connecticut, and New Jersey) are considered home school friendly (Madison, 2008; Lips & Feinberg, 2009). Madison (2008) explains that the reasons that these schools are considered home school friendly, to parents who currently home either school or are considering the task, is that there are no forms to complete or telephone calls the parent needs to make. These states also allow flexibility in their curricula and flexibility for time that parents spend on educational endeavors.

Fourteen states require minor regulations such as requiring the parent to notify the district of the intent to home school a child of compulsory attendance age. These states (California, Arizona, Nevada, New Mexico, Utah, Montana, Wyoming, Nebraska, Kansas, Wisconsin, Kentucky, Mississippi, Alabama, Delaware and the city of Washington, D.C.) also require no testing, no reporting, and no home visits by the school district (Madison, 2008).

Twenty states (Washington, Oregon, Colorado, South Dakota, Minnesota, Iowa, Louisiana, Arkansas, Tennessee, Florida, Georgia, North and South Carolina, Ohio, West Virginia, Virginia, Maryland, New Hampshire, Maine and Hawaii) that have moderate

regulations. They require written parental notification, state standardized test scores and professional evaluation of the homeschooling students' performance (Madison, 2008).

Conclusion

In conclusion, many parents are concerned about an overly standardized curriculum and a lack of moral and religious values in conventional schools (Apple, 2006). Some parents believe that interest-led learning (Morgan & Allee, 1999) is a powerful tool in the home school curriculum that parents are able to accomplish much easier than the classroom teacher is. Other parents are concerned for the safety of their children by the preeminence of media coverage of violence in the schools. This violence occurs at all levels in the public school system from the very young (kindergarteners, first graders, and high school). The influence of media articles has added to the fears and concerns of parents in their rationale to home school their children. For all of these reasons, homeschooling has rapidly expanded and seems likely to continue expanding.

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CHAPTER 12

UPBRINGING PROCESS QUALITY AND COOPERATIVE LEARNING IN FAMILY WITHIN LATVIAN TRANSFORMING SOCIETY

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Abstract

The need to address the problem of family upbringing process in Latvian transforming society rose from society philosophical change of paradigm shift and alongside coming upbringing changes in family. There where studied parental competences in upbringing. Theoretical was developed criteria and competences of parents in bringing - up process, that characterizes upbringing process quality in Latvia's transforming society. In the study using survey method was collected data about upbringing process quality in nowadays transforming Latvia. The data was interpreted by the data analysis program SPSS 15.0. It was concluded that the Latvian family upbringing remain relevant because of the people which related to the intimate and constant interaction (cooperation / interaction) at the time. That is how it is provided for each family member's progress-raising context. Generations' co-existence is focused to the next generation to the future.

Keywords

Family - upbringing - parental competence in bringing – up process

Introduction

Nowadays political and economic situation in the world is highly unstable. The end of 20th century and the beginning of the 21st century is characterized by changes in all spheres of everyday life action and process of fast dynamics, often the exact in determinability, complexity, uncertainty, continuity, contradictory. In addition, these changes in Latvian different social levels are often indiscriminate accepted. This fact fundamentally difficult key value (implicit - explicit) complex nature of the transfer from generation to generation in the transformation of the situation, since the change of economic and political situation, always be reviewed before the proposed paradigm. Latvia is ranked among the countries within the last twenty years, where these changes have caused significant economic repercussions in all areas, including social and humanitarian.

Contemporary social situation is characterized by a paradox - its dynamism, pluralism and chaos becomes it persistent, becoming a stabile characteristic of modern society – transformative transformations. Transformational situation affects both the public philosophical and pragmatic view of the world and highlight human and social relations different characteristic requirements. That is the reason why in the society's specific area is actualizing questions about family and its place in transformational society. Important, that the family as the unit of development is in transaction both the internal relations between their participants, and also with the socio – ecological domain (Schneewind & Ruppert 1995: 17). Therefore, successful uprising process, as well as adult and child

relationship between the quality of both the private and the public sphere, as a whole depends on whether (and to what extent) the cooperation/ interaction processes between adults (parents) and children manage to organize according to the context and situations, taking into account the continuously changing boundary conditions (Zaouche-Gaudron 2002; Walper 2005: 25).

Therefore, the study aimed to explore parents' competence to rise as the quality dimension of uprising in the family.

1. Context of the study

Uprising process within the family depends on the type of social system, thus bringing up the historic nature of the family in each period is expressed ideologically dominant (ideological and philosophical) views and values. Latvian Society of the historical stage of the analysis suggests that, in accordance with the historical periods of uprising response to several dimensions:

Public dimension. This includes the dimension of collectivism and individuality opposition directions. Collectivism axis shows the idea of collective upbringing theories (Spona 1972; Bozovica 1975). These theories have been exaggerated a public dimension, creating collectivism, that did not focus on the development of individuality. Such a personality orientations were already in the family, where the family was recognized as the 'heart of society, cellule', and the task of bringing up a family has to bring up the public docile, useful and relevant parties, certain for public building (Pavasare 1984). So, in this dimension of human individual lifetime primarily are other goals and equality. With external care, lighting, education and social control is exercised targeted

family supportive and family-replacement system of public uprising system, where the concession and compliance of team is becoming an important personality trait. This dimension is characterized by authoritarian regimes created by the theory (Bozovica 1975, Studente 1988). It can be concluded that the individual is the means of public interest objectives and implementation (Ивин 2005) and the family is the discharger of community of ideas and the action to the child (Salputra 1977). Upbringing the importance of parental influence on child's personality formation of a socialist society pedagogical framework shape A. Studente, stressing that "family upbringing function positive and powerful show where the political and moral progress is under the direction of socialist society" (Studente 1988). As a major educational components of this historical period are the "job collectives, the various organs of living in places of public control and guiding education in the family" (Studente 1988). In this dimension an important upbringing tool is control, „upbringing“ as result in the family is sensed as parental competence "pedagogically correct affect to children, selecting effective means of bringing up a child" (Studente 1988), during this period the child is stressed as a corrective subject or the passive personality of process.

Individuality dimension. This dimension includes directions of the individualism and individuality. In Latvia this is Post-soviet regime time, which outlines ideas about democracy and liberalization in all fields, also in family. In society of competition everyone gets equal rights to realize their interests. Humans in competition with one another, occupy their niche, which meets in every real activity, thus occupying unequal different social positions of equal opportunities society. But today such an individual lifetime line when you freely expressed personal

position (talents, emotions, habits, vice) is also seen with caution (Антонов 2007). In practice is often quite the opposite effect contributes as expected, for example, that freedom can be unbundled with the responsibility for their actions and expectations of the exercise, resulting in an open and disguised selfishness emphasizing and domination line. In addition, the liability to be borne by himself is often imposed on others - a group of society as a whole, resulting in avoiding liability. The formation of such self-centered position is promoted mass cynicism, concludes A. Antonov (Антонов 2007). The author believes that such a man is destructive in personality as the man ,which is grown in the collective ideology, because they are fighting against something that is unpleasant in society or for something that they have strong believe, but the cynic - nihilist against social system as a whole (Антонов 2007). In this uprising ideological dominance in the family, where denial of old values creates misunderstood liberating and democracy with exaggerated individuality and uniqueness cannot realize the potential of uprising. As a result sketched individual consequences: inability to work, and responsibility for their decisions, both social Disclaimer (Антонов 2007), as well as, possibly, social apathy, because lifetime actions are linked to misunderstand own goals, non-critical power and dominance. Such an understanding also outlines ideas for the family as a social formation rudimentary nature. During this period, upbringing began to be denied as a social phenomenon of Soviet society, which was essential for the ideals and principles, but was ignored aims and values. Both of these dimensions exaggerated sense marks a dangerous move to exclude the social skills to work as a personal competence as well as misunderstand the value of prioritization, accountability and freedom, and

restricting the human personality self-improvement experience.

Contemporary Latvian society transformative situation characterizes with elemental upbringing paradigm shift and upbringing target changes, but the upbringing process organization changes transpire slowly. Contemporary social situation is characterized by a paradox - its dynamism, pluralism and chaos becomes it persistent, becoming a stabile characteristic of modern society – transformative transformations. This again changes the upbringing process in the family, in which is often indiscriminately simulated new upbringing philosophy, creating artificial and formal illusion about democracy in family, based on the misunderstood interpretation and different understanding of autonomy. Nowadays, children feel emotionally free because they are affected by the transformational society's philosophical world view, but parents still believe that children need to be brought up, consequently many families fail to co-generation and mutual learning, and learning of parents, developing their personality and human relations, the result does not encourage the child's development as autonomous personality. Parental understanding of upbringing competence is based on pedagogical idea, that is the parents' creative self-experience's component, which encourages the social situation's targeted direction, interpreting the ordinary and extraordinary situations of life as educational situations and supporting the autonomous personality development in family everyday life-action, characterizing the educational quality of the process. In other words, the competence of parents in bringing up a balanced personality includes cognitive, emotional, and behavioral components related to inter-connection parent child, where the collaboration / interaction between the satisfactions of his needs are

interiorized and exteriorized values, developed attitudes.

Theoretical guidelines for parents' competence to bring up collected and analyzed by developing the criteria of parents to bring up competence and indicators (Medne 2009). The main setting of four criteria: first the family as a union, it divided the three indicators: an open, encouraging and supportive vertical and horizontal dialogue; balanced belongings, courtesy's internal and external boundaries, the unity of principles, goal and values. Second - freedom in the family, dividing three parameters: the equality; independence; responsibility. Third - solidarity in the family, with two factors: attitudes towards themselves; attitude towards others. The fourth is co-operation in the family with three indicators: mutual exactingness sustainable; participation in the total family life; family life productivity (Medne 2009).

2. Theoretical Background

Family upbringing is the quality of pedagogical function implementation in daily life, which comprises both objective and subjective factors. Therefore, its own, individual paradigm is developed within each family, which has empirical basis and is exposed as individual signification of life experience (Выготский 2001). Analyzing the upbringing process in the family, A. Spivakovska highlights that absolute upbringing ideal does not exist, parent's \rightleftharpoons children relationships are individual and unique, and however, it is possible to define common features of parental upbringing competence (Peseshkian 1987, Спиваковская 2000). The objective factor is the upbringing field and its ecology. By aim-oriented actions of adults within the upbringing field, natural child development and activity are facilitated within the time and space; a child finds a personally significant activity

corresponding to his/her interests, which, in its turn, results in the strengthening of personal purport. Consequently, each family member's needs are satisfied, values and attitudes are developed. Mutual cooperation/interaction in the family is revealed in the implementation of the upbringing function. Therefore, cooperation is one of the criteria of parental upbringing competence (Spona 2006, Deegener 2000, Zaouche-Gaudron 2002, Mollenhauer & Brumlik & Wudtke, 1978, Kağıtçıbaşı 2007, Куликова 2000, Черников 2005, Давыдов 2006: 17, Карабанова 2007, Лодкина 2008, Пономарев 2008, Старосветская 2008: 49 - 112, Целуйко 2007: 59). Cooperation as the criterion of parental upbringing competence is viewed as joint and concerted activity, mutual support in achieving both personal and common goals, which aims at facilitating self-confidence and a certain level of satisfaction with the cooperation process and results. Cooperation is characterized by the shared goal, joint input and time allocation, as well as overcoming difficulties (Рожков & Баибородова 2004: 101), this is a positive aspect in facilitating self-upbringing (Сластенин 2004: 75). Cooperation is possible if trust is ensured (Шпренгер 2007: 146). Cooperation between an adult and a child comprises being together, participation, common vision, creativity, it means not just being together, but also being someone (Сластенин 2004: 76). Cooperation, based on parents' experience and authority, facilitates the improvement of cooperation quality (Гликман 2002: 34), a child gains experience in responsible relationships (Голованова, 2004: 236) and is provided the possibility to show initiative which is supported (Цукерман, 2000: 45). Successful cooperation is characterized by trust (Журавлев 2005, Целуйко 2007), mutual significance (Пастернак 2008: 34) and mutual learning (Liegle 2006). Cooperation facilitates deeper self-understanding; understanding of the others and the world (Цукерман 2000: 87), the

goal of upbringing can be achieved only in cooperation (Сластенин 2004: 61). The following indicators were defined for this criterion: firstly, stability of mutual demands (Mollenhauer & Brumlik & Wudtke 1978, Куликова 2000, Сластенин 2004), where demands stand for certainty about each family member's wishes and precision in choosing activity tools and their application. The basis for a child's independence and cooperation ability is love, model and stable statement of demands in challenging *situations* (Schneewind & Böhmert 2008: 57). Therefore, demands and requirements should be logical, comprehensible and leading to logical conclusions (Сластенин 2004). Mutual demands within the family ensure the border between independence and responsibility for joint life activities. The second indicator is participation in joint activities (Spona 2006, Mollenhauer & Brumlik & Wudtke 1978, Kağıtçıbaşı 2007, Куликова 2000, Старосветская 2008: 49), where participation is viewed as mutual facilitation and support of opportunities, choice and responsiveness within the family joint life activities. Participation in family activities (sport activities, enjoying music, etc.) ensures the existence of human capital latent resources *esamību* (Werner & Lange 1999: 292). The third indicator is family productivity (Mollenhauer & Brumlik & Wudtke 1978, Kağıtçıbaşı 2007, Куликова 2000: 49), where productivity is understood as the subjective feeling of satisfaction (Raven 1984; Dreikurs & Gould & Corsini 1997), based on assessment the emotional dimension of cooperation (Лидерс 2008: 29); this indicator also comprises the idea of volunteering. The emotional climate in the family and satisfaction with it are significant psychological and pedagogic effects (Hawellek 2005: 59, Лидерс 2008: 31). Regardless of the fact that each family member's need for autonomy and intimacy cannot be practically separated from mutual

relationships, each family member's satisfaction with family joint activities is one of the quality criteria (Солодников 2007: 58). Correspondence between real and expected situations (Лидерс 2008: 25), mutual respect (Журавлев 2005: 50) as well as the strategy for coping with difficulties (as it is the prerequisite for the effectiveness of problem solving) (Meyer 1980, Карабанова 2007) ensure the satisfaction with family joint activities. Satisfaction is closely linked to family stability (Brandtstädter & Felser 2003: 65).

The upbringing function implemented in family activities is rooted in relationships and unity. Based on these ideas, the next criterion of parental upbringing competence to be distinguished is family as a union (Juul 2007, Kağıtçıbaşı 2007; Куликова 2000). In the framework of the Doctoral Thesis, union was understood as the composition of family relationships, which is characterized by unity, the sense of belonging, openness and honesty (Grunwald & McAbee, 1999: 344). To describe this criterion, the following indicators were put forward: firstly, unity in stating aims principles and values (Peseshkian 1987, Trommsdorff 2001: 39, Brazelton & Greenspan 2002: 288, Zaouche-Gaudron 2002: 26, Juul 2007, Willi 2007: 149, Петровский 1992, Куликова 2000, Спиваковская 2000, Кукушин 2002: 75-77, Овчарова 2006, Карабанова 2007, Божович 2008, Старосветская 2008), which reveals the perspective of the upbringing process. Psychological unity characterized the natural group dynamics, based on the common understanding and support of family members' relationships (Сушков 2008: 130). S. Fuss highlights that upbringing cannot be democratic, if parents lack unity (Fuss 2006: 69). Within the upbringing, parents' behaviour based on unity facilitates the development of well -functioning upbringing team (Schneewind & Böhmert 2008: 51). Within the family upbringing process, values are

understood as life activity components which are appreciated and respected by a person (Зиновьев 2008) and which make a person's activity meaningful and form the basis for personality and behaviour formation and development (Зритнева & Клушина 2006). The values unity is emphasized as the defining aspect within the upbringing process, as, given the unity of values, parents provide support to each other (Зритнева & Клушина 2006: 101). The unity of values predetermines the unity of the family (Зритнева & Клушина 2006). The unity of values ensures the possibility for a child to interiorize them based on individual choice, resulting in the formation of personal meaning (Голованова 2004: 235). Even though the goals of the upbringing process are predetermined by a certain societal historical period (Peseshkian 1987, Божович 2008), the goals can be considered pedagogic if age peculiarities are taken into account (Божович 2008). The goal predetermines the content and methods in the upbringing process in accordance with age peculiarities (*ibid.*), therefore, unity is a crucial aspect in the development of autonomous personality. The shared goal helps to maintain unity within the family (Reyer & Müller 1992: 79). The second indicator is balanced internal and external politeness and belonging (Liegle 2006, Kağıtçıbaşı 2007, Куликова 2000), which reveals the acceptable norms and openness to opportunities in the family life activity composition. The third indicator – open, encouraging, supportive vertical and horizontal dialogue (Gleissner 1999, Gergen 2002, Zaouche-Gaudron, 2002, Kast 2003, Juul 2007, Цукерман 2000, Куликова 2000, Гриценко 2005) – encompasses power hierarchy in family activities. According to Gricenko, the dialogue is the opportunity to discover others and oneself (Гриценко 2005: 127). The dialogue as an upbringing technique comprises opinion and information exchange (Zaouche-Gaudron

2002), taking into account common interests of the participants, the ability to be distanced from local circumstances and one's own special situation (Ijabs & Kruks 2008: 6). The dialogue starts with adults' familiarization with a child's feelings, needs and desires, therefore, the adult is open, interested, but not only knowledgeable (Chopich & Paul 2001: 136). The dialogue encompasses the interrelation model: understanding, response, as well as response comprising responsibility (Liegle 2006: 18). Within the upbringing, the dialogue serves as direction towards the support for positive *development* (Hawellek 2005: 56). This opportunity promotes stabilization of family members' subjective position, respect towards others' judgements, cooperation skills and tactfulness, thinking and argumentation skills within the upbringing process (Рожков Баибородова 2004, Слостенин 2004: 76). Unambiguous, clear and open dialogue dialogs (Juul 2007: 86). A person's independence and autonomy can be developed in the environment, where the dialogue finds its place (Zaouche – Gaudron 2002). A person asserts himself/herself by implementing his/her desires and self-management abilities within cooperation (equal and responsible action) (Кузьмина 2007). Based on these statements, freedom in the family can be put forward as the next criterion for parental competence (Jonas 2003, Kast 2003, Reichenbach 2007, Франкл 2001, Кузьмина 2007, Старосветская 2008), which is exposed as family members' free choice and the opportunity to implement one's independence, equality and responsibility in accordance with other family members' efforts, needs and goals. This means that a person lives in freedom (Reichenbach 2007: 160), as well as each family member's freedom is conventionally limited by other family members' freedom (Мамардашвили 1996: 193); the understanding of autonomy can only be developed given freedom (Kruse 2001: 65). Freedom is just a

concept without cooperation in certain situations (Wild 2003: 58). To describe this criterion, the following indicators were identified: firstly, equality (Schneewind & Ruppert 1995, Kađitđibađi 2007, Старосветская 2008) as an indicator of horizontal and vertical needs expression and implementation. This indicator comprises permissiveness and emotionality (Schneewind & Ruppert 1995: 162) as well as participation in decision making (Trommsdorff 2001: 39). The second indicator is independence (Trommsdorff 2001: 39, Старосветская 2008) which is exposed as the mechanism of independent decision making. A child can develop independence only if supported by adults (Цукерман 2000: 75). However, it is impossible to discuss independence without values and solidarity, as the moral essence of independence is "a person helps others in achieving results, coping with difficulties for the benefit of the society" (Amonasvili 1988: 36). Only safe and emotionally open environment facilitates the development of *independence* (Liegle 2005: 513). The third indicator is responsibility (Gergen 2002, Jonas 2003, Juul 2007, Kađitđibađi 2007, Франкл 2001, Зритнева & Клушина 2006, Куликова 2000, Дружинин 2006, Лодкина 2008) as each family member's attitude components, which is characterized by the conscious necessity to be responsible for one's verbal and non-verbal actions and consequences aimed at providing possibility to open and implement potential for each family member. Responsibility as a personality feature is developed in the process of social norms and values interiorization (Ильичева 2006: 241). True community is characterized by responsibility (Франкл 2001: 74, Chopich & Paul 2001: 180). Responsibility is acquired from each other by noticing role models in words and actions (Jonas 2003: 184-197). It is parents ability to balance responsibility in accordance with a child's age peculiarities, which is the basis for a child's emotional

well-being and the acquisition of responsibility experience, as this process is frequently challenging for children, as well as parents do not always understand how a child interprets a situation and the environment (Meyer 1980). J. Jul highlights the unity of common and personal responsibility, which means taking responsibility for both personal and family life. According to T. Kuřikova, family is a mediator between children and the society (Куликова 2000).

Therefore, the conclusion can be drawn that family upbringing is also transfer of social experience. Thus, the significant prerequisite for subjective family upbringing is family traditions. Traditions have active nature, as they are transferred from generation to generation; traditions undergo transformations and can be adjusted to new social conditions (*Ibid.*). The constant is their meaning in the society: they serve for strengthening relationships across generations and function as the mechanism for transferring social values (Захаров 2000, Сливаковская 2000). Based on these claims, the next criterion to be distinguished is solidarity (Zaouche-Gaudron 2002, Bettelheim 2003, Lüscher & Liegle 2003: 242, Белинская & Тихомандрицкая 2001, Зритнева & Клушина 2006, Лодкина 2006: 29) as matching one's own interests, opinions and actions with others. Solidarity within the generation context presents one of the relationships aspects (Lüscher & Liegle 2003: 242). According to F. Ziegler, solidarity is closely linked to responsibility towards oneself and the others and the understanding and acknowledgement of justice (Ziegler, 2000). The analysis of solidarity carried out by Rein highlights that even though the experience of solidarity does not always ensure deeper satisfaction, its lack goes hand in hand with loneliness and dissatisfaction.

Therefore, the author draws the conclusion that the idea of giving, but not taking ensures emotional well-

being is intriguing (Rein 1994: 12-13). It is solidarity that allows the family to discover its resources (Hargens 2000: 32). Rhetorically, family is the place, where solidarity is acquired, but not the place, where it is just possible to acquire solidarity; therefore, it is the projection field of morals, desires and norms (Lüscher & Liegle 2003: 265). Its indicator is, firstly, attitude towards oneself (Klēģeris 1959; Spona 2006, Kağıtçıbaşı 2007, Berry & Poortinga & Dasen 2002), which is exposed as the conscious development and maintenance of one's own interests and habits and matching them with other family members, as well as supporting interests and habits of other family members. According to N. Klēģeris, the development of responsibility is closely linked to habits (Klēģeris 1959). Each family member in the competent family takes into consideration opinions and positions of others (Шнейдер 2007: 91). Therefore, the conclusion can be drawn that habits are exposed as active attitude towards oneself of different polarity, which makes grounds for self-education and self-upbringing. As a consequence, habits development is more complicated than instillation of moral concepts (Klēģeris 1959). The attitude towards oneself is closely linked to the attitude towards the others, as emotional well-being of each family member is the highest achievement of being together (Bettelheim 2003). The second indicator is attitude towards the others (Klēģeris 1959, Lieģeniece 1992, Bronfennbrenners 1993, Rogge 2004, Mollenhauer & Brumlik & Wudtke 1978, Мид 1988, Колесова & Лутовинова 2008, Нездемковская 2008) which is exposed in the uniqueness of family traditions which are consciously started, organized, maintained, cultivated and transferred from generation to generation. Traditions form the basis for the "collective memory"; being strengthened in the past they provide direction for the future (Солонин & Каган 2007: 176). Traditions

ensure the schedule and rhythm of family daily life and festive times (Klēģeris 1959; Bettelheim 2003), facilitating the sense of belonging not only to the family, but the world, in general (Bettelheim 2003: 388). This serves as a pedagogic orientation towards the family cooperation in daily life and during celebration time (Hawellek 2005: 57), which results in strengthening values (Сластенин 2004: 72) and cooperation among generations (Куртышева 2007: 234). Traditions can be transferred and traditions having new contents and form can be developed (Куртышева 2007: 230). The development of new traditions is rooted in each family member's individual experience and the uniqueness of the events in the joint family life (Куртышева 2007: 231). Traditions substantiate the true nature of solidarity in the family (Bettelheim 2003: 374). We propose to state such solidarity as pedagogic solidarity, as, on the one hand, it facilitates the development of the sense of belonging to the family and, on the other hand, it supports and facilitates the development of autonomy and responsibility. Traditions have indirect educational nature (Klēģeris 1959), they strengthen values (Сластенин 2004: 72) and reveal the emotional aspect of being together (Bettelheim, 2003). Common joy ensures unity; laughter does not only make grounds for the sense of unity, but also decreases aggression, as people experience the sense of belonging to a family (Грановская 2004: 483).

Therefore, the conclusion can be drawn that apart from the society development prospects relevant in the context of Latvian transformative society, family upbringing (which is meaningful) maintains its significance given the recognition and acknowledgement of mutual learning within the family; equality, respect, common values and common upbringing philosophy acknowledged by both parents and children are promoted. This prerequisite ensures

the possibility for a family as value to undergo evolution in the transformative society. Consequently, these are parents, who are responsible for the family's ability to undergo critical and qualitative evolution in the context of cultural and historical society development (this allows not to passively adjust or succumb to modern mysticism, but to encourage the development of personal and children's autonomy by making critical and goal-oriented evaluation of societal prospects. Therefore, the basis of the upbringing field is in the closest child development zone (Выготский 2001). Parental upbringing competence as an active, constructive, integrative and psychological multitude developed as a result of individual expectations, demands and cultural environment predetermines the quality of the upbringing field. A child develops his/her values, attitudes and states the personal meaning for behaviour rooted in culture in the process of interiorization and with the help of parents' support. The upbringing field does not fully predetermine a person's social experience and values – they are determined by active mental activity – interiorization.

A person does not only obey to social norms and conditions, but he/she also assesses them and either accepts or does not accept them as his/her value. This conclusion goes hand in hand with the idea of H. Vegas that a person should constantly "show himself", i.e. a person should not only implement the function of development given by nature, but also should he implement the existence function by developing his human essence (Berac 2007:13). The author believes that it is possible, when a person's reality is open, therefore, people independently complete themselves with certain human contents and develop the attitude towards oneself, the others and the world; they become responsible for themselves and their decisions. This viewpoint corresponds to V. Kast's

(2003) opinion that life-long learning results in the formation of an authentic person, i.e. having harmonious balance between freedom and liability. Therefore, the aspect of unity of principles, goals and values is significant within the upbringing. In this case, a child is encouraged to define and develop his/her values - not at declarative level only, but the ones which would substantiate his/her actions. Therefore, the subjective feeling of satisfaction/dissatisfaction affects family members' individual assessment of values. As a result, values undergo development in the process of interiorization, they become or do not become personally meaningful and they are exteriorized as attitudes (behaviour is attitude in action) or not. This way both inter-subjective life experience in the family and each family member's subjective life experience are developed which are inherited and transferred from generation to generation.

The results substantiate the development of a pedagogical portrait of a family: parents define both achievable and real goals their life activity and child development. Initially, parents have common goals, principles and values which become significant also for children in the process of family cooperation/interaction (interiorization). Parents agree upon the goals, principles and values (avoiding the presence of children), this way implementing pedagogical unity in practice; value declaration and demonstration are observed. As a result, each family member develops the sense of belonging to the family and is eager to be together, at the same time implementing his/her autonomy possibilities. Such relationships are characterized by tactfulness and respect even in conflict situations and facing difficulties; family life productivity (Medne 2009).

3. Field study

To determine the real situation of education, was organized field as a social system study (Kron 1999, Mayring 2002, Wolff 2007), which analyzes the uprising process organization content and quality in Latvian families, raising the subject of the study parents competence in bring up. Field research was intended to detect and analyze the actual levels of parents' competence in bringing up in families of Latvian transformational society, according to the developed and pilot tested benchmarks, their theoretical performance construct and to answer question about the quality of uprising in the families of transformational Latvian society.

3.1. Field study procedure

The field study took a broad social context, using questionnaires pilot validated method. The study sample in this study phase reflects the Latvian families' diversity in structural and uprising fields. The field study covered the ~ 1% of Latvian residents on childbearing age (Latvian Statistical Yearbook 2008). The field study was carried out from April 2008 to February 2009. Gender selection of respondents to the study - women $n = 467$, or 74% and males $n = 165$ or 26%. This phase of the study respondents ages ranging 18 - 80 years. The average age $M = 40.81$. Mode is 38 years. Survey results were analyzed by frequency, using descriptive and analytical statistical methods. articles generally start with an introduction which contains a clear statement of the research question, supported by all necessary definitions. The introduction would also outline what is at stake in your research.

3.2. Results

For presentation results of research average weighted indicators are chosen. For comparing different scales, which are made by different count of statements. The resulting of parenting skills is appropriate to scales interpretation „Higher result means lower level“ According to idea of research to make interpretation of picture easier, where higher result means positive meaning, reverse value graph was used. Based on average weighted indicator scales, reversed values of parenting competence indicators can be placed appropriate to levels which were created (1st graph).

The results of field research showed that the transformation of Latvian society in parenting process in family maintains co –operation between genders.

For better understanding competence realisation and opportunities for development, parenting competence was analyzed in eleven theoretical construct indicators and their connection with others (demographical) indicators.

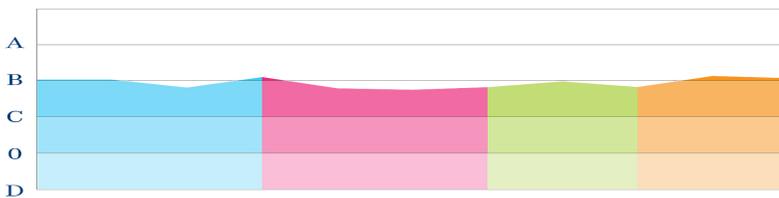


Figure 1. Performed Parenting Competency- Levels within the Research Field

During comparison between both genders (statistical test was used with nonparametrical methods because empirical division is different from theoretical normal division), approval was achieved in differences between genders in five scales from eleven. In scales balanced inner and outer borders of membership and

politeness ($p < 0,01$) open, encouraging vertical and horizontal dialog was discovered ($p < 0,05$), maintance of mutual exactingness ($p < 0,01$) equality ($p < 0.05$) and attitude to other people ($p < 0,01$) responses from women are statically lower than responses from men, it means that responses from women are more positive. Achieved data confirms that there are differences between mother and father parenting competence, that means even in unity mother and father has their own parenting mission. It would be inappropriate to interpret these differences in good or bad, because these differences confirm that women and men ideas of parenting are natural.

It matches with nowadays psihophyologist research results, that these differences based as much on cultural differences as in physical differences in brain activity (Ермеева & Хризман 1998). It encourages making the assumption that differences between mother and father parenting competence enriches parenting process.

Connection between biological age, where respondents had become parents and construct scales were checked. There were no connections found. That means that younger parents has less responsibility, less understanding about parenting or opposite, older parents has more responsibilities and understanding about parenting, was not approved. Probably these statements are confirmation from social stereotypes or incompetence.

Based on analysis between respondents with different education level (basic, middle, middle professional, college and higher) conclusions were made that statistically important differences are in these scales: *balanced membership* and *politeness inner and outer borders* ($p < 0, 01$), *open, encouraging, supporting*, appropriate vertical and horizontal dialog ($p < 0, 01$),

attitude to yourself ($p < 0, 01$) and *attitude to others* ($p < 0, 01$). For better understanding about differences between respondents with different education level, statistical test PosHoc was taken.

This field of research confirmed that there are *important differences between respondents with basic education level and other respondents*. It means that results are becoming more positive by increasing parents education level.

These results updates question, that respondents which has only basic education has lower parenting competence. Probably education politic audience are parents with basic education level, because with next levels there are tendencies for positive changes. That means that there is a need for pedagogical consultation and/ or further education for parents, where parents could developed their parenting competence by knowing better their personalities and discovering their parenting potential. These results encourage making a consumption that education level increase parents competence, which is connected with global world vision extension in process of education.

Overall viewing a statistically significant relationship between the biological ages of the respondents in which respondents have become parents and their different educational levels may make the assumption that no matter what age people are becoming parents, but it is important that parents continue to acquire formal education.

Respondents who have a different current relationship status (married, unmarried, divorced, consensual, widowers) provided statistically significantly different answers 7 of the 11 scales: unity in purposes and values ($p < 0.01$); balanced propriety and membership of internal and external borders ($p < 0.01$); family life productivity ($p < 0.01$), equality ($p < 0.05$); autonomy

($p < 0.01$), attitudes towards themselves ($p < 0.05$) and attitude towards others ($p < 0.01$).

On a scale family life-action productivity differences between married respondents showing a group of respondents who are not married, and respondents who are divorced, while divorced respondents still show differences in the groups of respondents, who are widowers.

Scales of attitude towards themselves show a statistically significant difference in respondents from respondents group who are married from those in civil marriage and divorced.

Scale treatment of other statistically significant differences in the presentation of the respondents of the respondents group who are married and those who are divorced or a civil marriage.

The results obtained confirm that the respondent group, in which the relationship between parents' current legal status is married, the results are generally more positive in results of sense mentioned indicators; can be assumed that the legal relations organization promote the safety and sense of belonging, which in turn increases the competence of parents bring up their scales of unity, purpose and values; balanced belonging and courtesy internal and external boundaries; family life-action productivity; attitude towards themselves; attitude towards others. This means that the families of respondents knowingly and purposefully organized uprising processes and interactions within the family, as well as to maintain the child's age-appropriate sense of freedom. In other words, parents' satisfaction with the mutual relationship correlated with satisfaction with the uprising process and the overall family life-action.

Questionnaire respondents were asked to indicate the level of income per month per family member. Analyzing what are the differences between respondents with different income levels, recognized differences in the scale of several parameters: unity, purpose and values; balanced belonging and courtesy internal and external boundaries; family life-action productivity; attitude towards themselves; attitude towards others. The group of respondents with incomes up to 100 LVL per household member showing a statistically significant difference in the groups of respondents with incomes from 101 LVL to 150 LVL ($p < 0.05$); from groups of respondents with incomes from 251 - 500 Ls ($p < 0.05$); and from the groups of respondents with incomes of more than 500 LVL per household member per month ($p < 0.01$). Conclusion about this question is that the families of both low and high levels of revenue in these scales indicators are more positive by sense. It might reveal a different aspect of the value of money or social status importance in families. Families with middle level of the revenue money is a goal, on the one hand characterized philistine position in life, living by targeting their personal wealth or social status, on the other hand, reducing the importance of the relationship. It is possible that these respondents tend to value their relative rather than absolute prosperity. In other words, these results highlight the discussion of middle-class society as a quality indicator. Both low and high levels of revenue money are a tool. Both poles (both low and high) interpretation for the values is different shaped, but identical in content (ideas). It is possible that these two poles amortize assets and the risks they assume taking greater responsibility for themselves while addressing different kinds of difficulties. These results suggest that perhaps there is still offered public opinion (Diena 2010), that poverty is the leading condition for divorced families, alcoholism, crime and an early sexual relationship is

biased, namely, the allegations means that poverty have correlation with mental function decrease. It is likely that poverty is something which cases are only the consequences of failure of a match, and these claims would not be correct to generalize. Feasible, that in this respect, it would be considerable parental teaching, educational and economic consulting and / or parents need to further education. In this respect both family life-action productivity, both traditions in family, family internal and external borders and unity in principles, goal and values are realized with better quality of parental competence in bringing up the overall performance of family life-action implementation (being together). To make more nuanced conclusions, would require in-depth study. In this stage of the research findings are in line with the different historical periods made knowledge (Адлер 2003, Андреева 2005), that maturity of personality is both successful for mutual relationship foundation, both emotionally favorable for family life-action forming. The field study also confirmed the maturity of personality correlation with parental competence upbringing and its quality, such an important aspect of confirm the parents' educational level. We can also conclude that the overall in Latvian transformational society, despite of society's developments relevancies', family upbringing in contemporary society retains its significance (as having a particular sense), with condition, that if in the family is maintained mutual learning, equality, dignity and upbringing philosophy. In such a condition family as a self-value is able to evolutes in transformational society. In other words, parents are responsible for their family and whether they realized functions can critically quality evolutes in the cultural and historical context of the progress of society (rather than passively adapt, but a critical review of trends in society and orientate their children's autonomy development).

4. Findings and Discussion

The research goal was to identify and analyze levels of parental upbringing competence in families in the transformative society of Latvia, as well as to find answers to topical questions on individual, social and educational direction of the family in the transformative society of Latvia. In general, the conclusion can be drawn that family as a value does not lose its topicality in the transformative society of Latvia and parents ⇔ children relationships in the family across generations remains a significant aspect of life-long learning and each family member's experience enrichment. As the research result, a universal cooperation paradigm was developed: the universal tool of parents and children cooperation is common values, equal cooperation characterized by respect, trust and mutual learning in the upbringing field. The upbringing field is conventionally demarcated upbringing environment which ensures balanced opportunities for needs satisfaction, development of values and the dynamics of their personal significance as the results of cooperation/interaction. Therefore, the subjective feeling of satisfaction/dissatisfaction with basic needs affects family members' individual assessment of values. As a result, values undergo development in the process of interiorization, they become or do not become personally significant and are either exteriorized as attitudes or not (behaviour (both verbal and non-verbal) is attitude in action).

The analysis of scientific literature and the research results reveal a number of statements, two of them are put forward for an open discussion:

Nowadays, the upbringing process in the family is mutual – *children learn from parents and parents learn from children;*

Within the upbringing process, parental upbringing competence is implemented more successfully, if parents systematically and voluntarily develop their upbringing competence which is based on values, knowledge, skills and abilities, which form a whole aiming at finding solutions in different life activity situations.

Conclusion

The analysis of scientific literature and the empirical research substantiate the necessity for pedagogical consultancy and parent further education (as the components of life-long learning) in Latvia aimed at the development of parental upbringing competence by discovering personal upbringing potential.

The research results substantiate the necessity for further education for specialists in different fields, including media representatives and officials, aimed at decreasing the spread of social stereotypes about family upbringing in the Latvian society, as people gain concepts of topical and leading ideas in the modern science or particular scientific fields from different media, including printed media. Modern popular editions are those which facilitate the formation of concepts and understanding of certain questions, but their focus on pedagogical values within the upbringing is minimal, which ensures the free niche for artificially created pedagogical phenomena and popularity of modern mysticism in the society, but not new knowledge.

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CHAPTER 13

PARENT EMPOWERMENT: EXAMINING PARENTAL ATTITUDES OF SCHOOL SYSTEMS

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Abstract

The understanding of values and attitudes is paramount when developing partnerships in an educational context. The alignment of these between homes and schools plays a pivotal role in the development of children and young people academically and socially. Traditionally, policy makers have promoted partnerships through a hierarchical model, which has the danger of over-looking underpinning values that, if known, could better influence change. This study examines the values and attitudes from a parent-centred viewpoint. *Action Research* methodology is used as a model in examining these attitudes within a practitioner-led cycle of school improvement. A model for examining parental engagement is adapted from Hornby (2010) as a structure to evaluate practices and propose areas for development more closely aligned with the attitudes and values of the parents. Findings of the research have been used to improve school practices within the areas of communication, both written and personal, home learning and engagement with a wider parent population by attempting to overcome barriers that may have resulted

from social structure, ethnicity or gender. This model could prove beneficial for practitioners and researchers wishing to create advocacy for parents and align the values and attitudes of all stakeholders in a school context.

Keywords

parents – partnership – empowerment

Introduction

The importance of home-school partnerships has been an element of government policy in England since the Plowden Report of 1967. Over the past decade various policy documents and reports have been issued to schools emphasising ways to develop these partnerships and stressing the involvement families should have with schools: *Involving Parents, Raising Achievement* (DfES, 2003), *Every Parent Matters* (DfES, 2007), *Parents, Carers, Schools* (OfSTED, 2007), *The Lamb Inquiry* (DCSF, 2009). It remains a strong part of government policy as it is suggested that strong partnerships bring better outcomes for young people (Sheldon, 2003; DfES, 2007; OfSTED, 2007). Despite this, policy suggests that strong partnerships are not embedded into the system, especially for those parents of children who are the most vulnerable (DfE, 2011). Potentially undermining the trust required for successful partnerships is the suggestion that parents rate their children's schools (Lightfoot, 2012). It has been suggested that the lack of a widespread reciprocal relationship between schools and home brings into question the methods that have thus far gained precedence (Todd, 2007) and that strong home-school links still, on the whole, rely on the integrity and interest of individual schools and a hierarchical approach.

Purpose of the study

The purpose of this study is to use a proposed model (Hornby, 2010) and a methodological approach centred on participant-led research to determine how an individual school in England can evaluate the methods used to establish and develop relationships with parents through a realignment of values and attitudes. Outcomes from the study will provide an action plan aimed at addressing any shortcomings of the partnership. It is hoped this study will provide other practitioners with a model for examining the effectiveness of their own partnerships and through a consideration of the realignment of their expectations, values and attitudes with those of families.

There are many reasons why schools and families would desire to improve their partnerships. Perhaps the most important potential outcome of a successful partnership between home and school is that children and young people (CYP) will make better academic progress (Sheldon, 2003; DfES, 2007; OfSTED, 2007) and have fewer problems related to students' work or behaviour (DfES, 2007; OfSTED, 2007). Additionally, a parent-centred approach promotes advocacy for families and aids in realigning the values and attitudes of all stakeholders. Successive policy-makers have considered parents to be vital stakeholders in their children's education and therefore, require a greater sense of empowerment when discussing, evaluating and choosing their child's education (DfE, 2011).

The English inspection service suggests the need for schools to go above and beyond the usual level of participation by making them 'active partners' (OfSTED, 2007) and to find ways of engaging with families where there may be obstacles related to social class, language or family make-up. Some of the most remarkable improvements in CYP's attitudes and

achievement have come where extended families, including grandparents, were encouraged to engage with the school (OfSTED, 2007) and involvement with school became more 'family-centred'. As a result, parents' views should then be taken into account with regard to their experiences and knowledge of their children beyond the superficial, information-sharing level. Consideration of families' views, "Needs to go beyond matters of provision and access, to consider both the needs of clients, as they perceive them, and their assessment of the quality of their current experience" (Atkin et al, 1988: 12). Therefore, critical analysis of current practice would need to consider not only the information-giving process as part of parental involvement e.g. reports, home-school communication, but also, more detailed perceptions about the respect and care within the home-school community as a whole.

In order to gain a better insight into these perceptions, one would have to empower parents to make observations and possible criticisms of current systems within a school without fear of being judged or ostracised by the professionals involved. This self-advocacy and democratic approach forms the basis of *Action Research* (Stringer, 1999). It also moves the involvement of parents away from models that are more compensatory or transplanted towards an involvement that encourages families to be central to the decision-making process and having shared goals (Todd, 2007). A move towards a parent empowerment model would potentially, 'minimize asymmetrical power employed by schools' (Christianakis, 2011: 161) and increase teacher efficacy.

The model proposed by Hornby (2010) offers professionals and researchers a graduated approach when evaluating the level of involvement of families alongside the responsibilities of schools. He proposes

that communication and involvement with parents will vary depending on whether it is with an individual, a group of parents or a whole community. Considering this structure allows the researcher to establish whether the communication is effective for individuals, groups or communities. This is a highly relevant method of considering the effectiveness of home-school relationships because the majority of 'communication' with families has a tendency to centre around the transferring of information (Hallgarten, 2000).

Potential Barriers to Partnership

It was important to be aware of potential barriers in the formation of home-school relationships in helping to guide the researcher in planning the methodology. The partnership between home and school can have a number of limiting factors. Consideration needs to be given to the varied personalities and ideologies that can greatly influence how accepting the school is of parents' views, values and attitudes and the existence of an equal partnership. Teacher-workload and timetabling issues can also limit the nurturing of these relationships. Likewise, the relationship can be viewed differently by groups of parents who have different backgrounds and ideologies themselves. Indeed, some parents may have reservations about entering into partnerships due to their own experiences of education and schools. The final factor is the student who, at times, may wish to preserve a separation of the two parties in order to keep a degree of privacy about their own lives. In addition to these attitudinal differences which can occur, there are also social, gender and cultural factors which can affect the development of the home-school partnership.

Socioeconomic Background

Although, generally, all parents are looking for success for their child, differing social backgrounds can have a significant effect on parent and school relationships (Lareau, 2000; Crozier, 2000). Lareau points out that, "Family-school relationships vary between working-class and upper-middle-class communities" (Lareau, 2000: 8). In separate case studies, he highlighted a 'separation' of working-class parents between home and school and that the school was seen as predominantly the sole educator of the pupil. In contrast to this, within some upper-middle-class households the parents take on a 'leadership' role in the education of their child and "Do not depend on the school for authorisation, nor do they automatically defer to a teacher's professional expertise" (Lareau, 2000: 9). This research is corroborated by Crozier whose findings suggested similar differences between working and middle class homes. This is exemplified within the tension it can create for teachers who wanted greater trust from middle-class parents and to 'let them get on with the job and leave it to the professionals' (Crozier, 2000: 121). This can, in some circumstances, create strains on the relationship as the school may interpret it as undermining their professional judgment and expertise.

In some respects, these different attitudes can depend upon the parents' circumstances. Often, in the case of working parents, there is a lack of time to support students with their learning or engage with the school in the desired partnership. This can be particularly frustrating for these parents as they may desire to have a meaningful partnership with the school but do not have the time and opportunity to do so. These can be affected by a lack of flexible timings within the school. In addition to lack of time, there may also be a lack of technological and educational aids within the homes of working-class families (Lareau, 2000). This

can create strains when considering home-learning projects in which the parents, and the access to information at their disposal, may or may not have a significant influence on the outcome (BECTA, 2010). There was also more likely to be a greater understanding of the educational process within the households of the upper-middle-classes because of the higher number of 'educators' within these families. This would give them greater confidence when working in partnership with schools. As a result Lareau also found that upper-middle-class parents take a more 'assertive' role when decisions were made regarding their child with respect to requests for specialised support and exposure to academic material (2000).

Gender

Another factor affecting home-school relations is gender-involvement, more specifically, the *unequal* involvement of both the mother and the father. Most often, within all socio-economic backgrounds, the main influence over the CYP's welfare is the mother and parent-involvement may be defined as 'women's work' (Lareau, 2000). Fathers' involvement can be an important factor for improving academic performance and better behaviour (Garner & Clough, 2008). Furthermore, CYP, whose fathers showed little interest in their education, had reduced chances of academic achievement (Hobcraft, 1998). The challenge of gender-involvement, especially the involvement of fathers, is a factor which schools need to consider when developing partnerships.

Cultural

Multi-cultural factors can also affect the development of these relationships (Tomlinson, 1993; Crozier, 2000; Hornby, 2010). Tomlinson stated that, "Educational professionals still regard ethnic minority

parents as posing problems for schools, rather than as assets in the educational process" (Tomlinson, 1993: 131). One also needs to consider the representation of multi-cultural representatives within the staff and governing bodies. In cases where there has been an equitable level of parent-governors with an ethnic-minority background there has been a greater level of understanding and respect between the school and the ethnic minorities represented (Tomlinson, 1993).

Special Educational Needs

The partnership with parents of 'vulnerable' pupils, including those with Special Educational Needs, can be even more vital. The strains and stresses in these families can be great and, therefore, a need for a stronger partnership is paramount and has been recommended in government policy over the past three decades (DES, 1978; DfES, 2001; DCSF, 2009). Having a child with SEN can be an emotional strain on the family as well as the parents themselves (Beckman & Beckman-Boyes, 1993; Carpenter, 1997). Because of this, a great deal of empathy and understanding is needed by the staff working with the family. Much of the criticism is of an administrative nature including the use of the complaints procedure, especially regarding procedures around exclusion, statutory assessment and challenging authorities in relation to their decisions (DCSF, 2009). In cases where parents were dissatisfied with the professionals involved with the support of their children, they needed a better system of redress that took account of their views. It should be noted that families and professionals may have different perspectives when considering desirable outcomes from the relationships. Mallett (1997) compares the different perspectives which parents and professionals may have in these cases. A professional usually has a structure for working with these children and may extend their circle of colleagues, whereas for parents may become

separated due to experiences and circumstances (Mallett, 1997). This is also important when considering how advice from professionals may impact on families and their relationships (Cunningham & Davis, 1991).

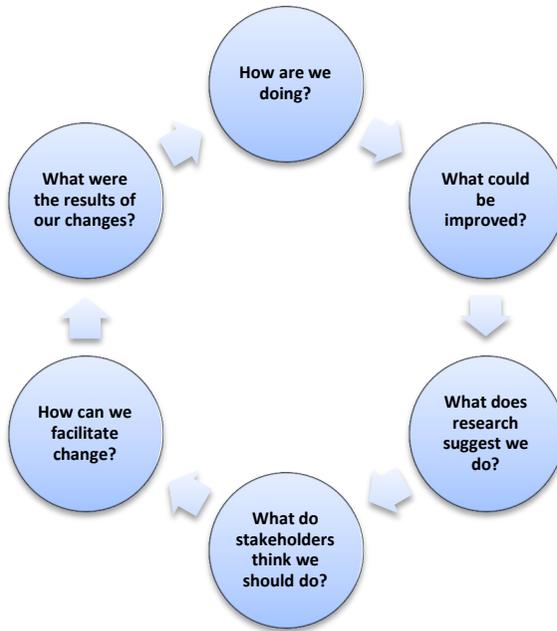
Methodology

Action Research was chosen as the most appropriate methodological approach to gain the views of stakeholders and determine areas for development within the home-school partnership. *Action Research* was selected as a methodology due to its inherent value of the community adapting and improving based upon its own internal decisions (Stringer, 1999). Central to the approach is an evaluation, by the researcher, of their own values and desire to impact on their own practice through critical reflection. This was relevant for the researcher who, as a senior leader in the school, had regular contact with parents and had investigated alternative approaches to encourage participation of parents in the school community. Although there was some success with these approaches, it was felt by the researcher, that there remained barriers between the home and school and that a parent-centred approach would elicit possible improvements from the parents' points of view. The use of *Action Research* as a methodological tool would create a stronger partnership dynamic and agreed pathways for school improvement. Therefore, in consultation with the leadership team, it was decided that the outcomes of the research would be used to inform an element of the school improvement plan (SIP) to later be implemented over the forthcoming year. This plan would then provide a lens for the whole school to focus on improving home-school relationships.

Understanding the school context and the participants' collaboration within that environment is an important element of the *Action Research* process (Somekh, 2006). Somekh refers to these partnerships being, "sufficiently fluid to maximise mutual support and sufficiently differentiated to allow individuals to make appropriate contributions given existing constraints" (2006: 7). The school where the research was undertaken was in a developing borough of a new city without an established community. The community was still emerging and being established at the time of the research. In many ways the community was a 'melting pot' of new inhabitants from many different social, economic, ethnic and cultural backgrounds from other parts of the city, as well as other parts of England and international locations. As a result, more than thirty languages other than English, were 'first' languages for students (aged four to eleven) in the school. Even though the borough grew substantially into a large urban community, there was, at the time of the research, no community centre and therefore the school acted very much as a 'meeting place' for parents.

Underpinning the reasons for the research was the researcher's responsibility for leading an area of the School Improvement Plan (SIP) allocated towards the development of family and school partnerships and the importance placed on promoting advocacy for parents. The researcher met regularly with many parents in a professional role and led an initiative to improve partnerships with parents known as 'Family SEAL' (DfES, 2006). Consequently, the researcher's awareness and analysis of the issues, mostly due to anecdotal conversations with parents, concluded that, prior to undertaking any development plan, the researcher needed to understand the 'partnership' from the parents' points of view by taking account of their attitudes and values. The outcomes would then

lead to a more informed SIP and have a greater impact for all stakeholders by leading to democratic change. The cycle of school improvement can be exemplified within the diagram below:



The most prominent need was to gather data about the parents' perceptions of the effectiveness of this partnership. Although the cycle of *Action Research* and cycle of school improvement would suggest a need for an evaluation of the approaches suggested within the SIP, this has yet to occur at the time of writing. Alternatively, this paper is concerned with the deeper understanding of the stakeholders' attitudes and values and how change can best be facilitated based on this understanding. It seemed that the greatest requirement of the research, therefore, was to take the time to listen to families. If given this opportunity, the different views of parents would generate ideas

which could then inform a wider survey and provide a strong vehicle for change. The intention was then to inform the planning of the SIP through the use of the interviews and surveys. The SIP would then form the outline which could then be monitored, evaluated and improved upon by the school community. The following formulated research questions were based on an understanding of the current context as practitioner researcher and the model of parental involvement adapted from Hornby (2010):

- *Face-to-face contact*: What were parents' perceptions about the effectiveness of parent-teacher consultation meetings? How did parents perceive less formal face-to-face contact?
- *Written communication*: Did written communication help to nurture relationships between home and school? Were there more effective methods that could be introduced?
- *Home-learning*: How did this impact on parents? Was this perceived as part of the partnership between home and school or an added burden?
- *Barriers*: What did the parents perceive as possible barriers to the partnership between home and school?

Interviews

Interviewing the parents directly would gain the greatest insight into their opinions of the home-school partnerships. Careful consideration needed to be given towards the parents who were interviewed so that a cross-section was represented. Interviews were conducted with parents of children across different phases of the school and having different home circumstances.

It was necessary to gain the perspective of individual parents whose children would be classified as fitting into a 'vulnerable' group. The 'vulnerable' groups who

participated included the parents of children with Special Educational Needs (SEN), those with English as an additional language (EAL), families where both parents worked or a single parent worked, parents new to the school and those whose children were entitled to free-school meals. These groups were selected due to a greater likelihood of the families experiencing barriers to home-school relations. The perspective of these parents would be important, especially as they would possibly encounter more challenges with the development of home-school partnerships.

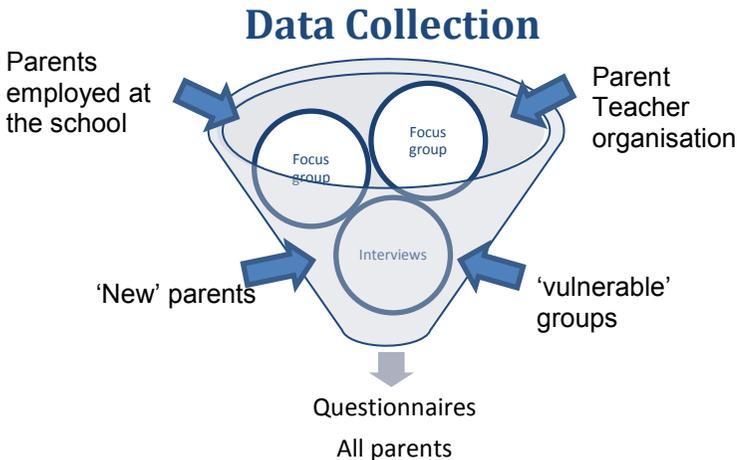
Individual interviews allowed greater flexibility and the meetings were arranged to suit their personal, work or child-care commitments. In two interviews, it was necessary for the parents to bring along younger children who were not of school age. Addressing these challenges would have been more difficult to manage within a focus group and lead to possible shortcomings with the data. Interestingly enough, these limitations, experienced in setting up the focus groups, are similar to some of the barriers for home-school relations suggested within previous research.

Focus Groups

In order to gain the views of a greater number of parents and triangulate the findings of individual interviews, it was necessary to facilitate focus groups of parents. It was essential there was a need for a forum in which they would feel comfortable about being open and honest. As Krueger and Casey state, "The intent of the focus group is to promote self-disclosure among participants" (2009: 4). In order to facilitate this type of environment group-members were selected who had familiarity with each other. It was more likely that people would self-disclose when the environment was, "Permissive and non-

judgmental” (Krueger & Casey, 2009). This preparation was used to avoid possible shortcomings of focus groups, especially the tendency to produce trivial results (Krueger & Casey, 2009) as well as the potential dynamics of focus groups in being either ‘dependent’ or ‘psycho-dynamic’ (Gordon, 1999). Because of these reasons the group-size was kept small (maximum of 5), and familiar.

It was intended that the focus groups and interviews would lead on to more specific issues about the effectiveness of the partnership in order to plan a questionnaire for a wider number of parents. The diagram below best exemplifies the methodological approach:



In some ways, the selection of parents to take part in the focus groups was more organic than anticipated. In selecting the parents for the focus groups, parents were selected from areas in which the parents would be familiar with each other. A randomly-selected group would possibly have less meaningful discussions because they would lack a shared perspective (Morgan, 1997). This may have limited the data and led to a more predictable set of outcomes.

The first focus group was a group of parents (four) who belonged to the Parent-teacher Association (PTA), a voluntary organisation of parents who supported the school through fund-raising. Selection of this group was based on its homogeneity and commonality. It was also evident, anecdotally, that many of these parents were keen to develop stronger relations between home and school and had had some valuable experiences, both positive and negative, to share. This impetus for change would hopefully lead to a more open discussion and a larger scope for the data.

The second group of parents selected for a focus session included the parents who were employed by the school. This group (five parents) also had similar circumstances as they were employed in the same role as 'working mothers', yet did not have homogeneous attitudes (known anecdotally). Their perspectives on home-school relations would be valuable because of their different interactions with the school in a unique capacity. Again, their familiarity with each other and the researcher would hopefully, provide a comfortable platform for discussion.

Question Structure

The question structure for both the interviews and the focus groups followed the 'questioning route' (a sequence of questions in complete conversational sentences) (Krueger & Casey, 2009). The rationale was that 'the questioning route' would give the questions more consistency in terms of how they were asked with different groups and hopefully lead to data that could be more consistently analysed. This method could also be referred to as a 'structured approach' leading from general to specific.

In deciding on the interview questions, consideration was needed towards the feelings and potential

vulnerability of the parents at all times. Therefore, prior to each interview and focus group, all members were briefed regarding the ethical guidelines of the research based on those suggested by BERA (2011) and the purpose of the research. Some parents may have felt self-critical about the level of their own input into their children's lives, so it was crucial to put them at ease and be non-judgmental and supportive. This involved allowing the families the security to say exactly what they thought regarding these issues without bias or judgment.

Potential Limitations of the Research

One of the main challenges for myself and the parents was to separate my usual role at school from that of researcher. This can often be the case when conducting practitioner-research. For myself, I had to remain open to any criticism of the school's procedures and short-comings and to accept any suggestions for improvement. In line with views posed by Stringer, I needed to be a 'facilitator or consultant who acts as a catalyst to assist stakeholders' (1999: 25). It was desirable for them to have the confidence that their opinions would be valued and that the outcomes from their opinions would form the basis of suggestions for the school improvement plan thus helping to advance positive changes in home-school relations.

Data analysis of the interviews was used to generate a questionnaire distributed to the entire parent body. This included a series of questions based on themes that had arisen from the interviews. Although the response rate was somewhat low (15%) it matched previous response rates from other internal surveys completed over previous years.

Some consideration was needed regarding the limitations of how the findings could be applied to

different school-settings or situations. This was due to the small size of the sample and the lack of comparison between educational establishments or families. This is often the case of *Action Research* studies that by definition are used as, "a powerful tool for change and improvement at the local level" (Cohen et al, 2000: 226).

The other limitation to using these forms of qualitative data was that the research could give rise to new issues that were not anticipated. This has been called 'progressive focusing' (Parlett & Hamilton, 1976). However, this could also be viewed as a positive outcome from the research. This was because the over-riding purpose of the research was to address school improvement issues through a realignment of values and attitudes and not try to develop standardised methods which could be then be applied to other settings. Again, this follows the key principles within *Action Research* of being community-focused (Stringer, 1999).

Research Findings

When arriving at conclusions, the data was analysed to look for group-to-group validation (Morgan, 1997). This was done by considering how often each topic was mentioned within a particular group or interview as well as the same topic being mentioned across different groups. Interviews were transcribed and common themes were identified. Only data that was shared consistently and, to the same extent, across different groups was used to identify themes.

Improving Face-to-face Contact

The first conclusion, which was drawn from the data, was that parents valued personal contact as the primary means of communication. The importance of

trust, knowing and being able to approach, when necessary, the people working with their children, was the most important variable when developing strong partnerships. This is supported by Atkin et al who state, "Written communication is no substitute for personal face-to-face contact" (Atkin et al, 1988: 130). Within the survey conducted, 52.4% of parents said that this *personal* contact was their preferred means of having contact with school compared to the use of written (38.1%), e-mail (7.1%) or telephone (2.4%).

Parents also valued highly the consultation evenings but found them frustrating in terms of the length of the time allocated to them, when the time-slots were available and, for some, the limited areas for discussion. One parent commented:

They always feel a bit short. It doesn't really feel you get much longer than to look at what's been written down briefly. You never really get much time to talk to the teacher about it and sometimes that may be the only time you get.

Some wanted to discuss more than the academic side to their child's time in school and wished to discuss social and, even, emotional issues. Despite this being a highly-valued part of the partnership, the data showed there was a significant degree of frustration with the amount of this contact as illustrated in the following statement:

I think in terms of parental involvement and things you feel that it's sometimes a closed shop and you feel that there is quite a distinct division between home and school. Because although they might say, oh, parents might come in and read and that but if you can't do that then there really isn't any scope for, you know, parents to be involved.

Limited amount of contact in the mornings, before school starts, did not allow parents and teachers this valuable time to share concerns or experiences. Having said this, there remain constraints upon the school in terms of curriculum-time and issues of safety and security which put restrictions on this method of contact and access which parents may have had in the past for instance, at nursery, where there may be more accessibility to talk with staff.

Written Communication

The second conclusion which was drawn from the data, was that the *consistency* of how written communication was used had areas for significant improvement. The importance of written communication was essential, especially when the amount of time for face-to-face contact was limited or not feasible. For many working-parents this was often the primary means of communication.

The home-school communication books used within the setting offered a personal, one-to-one channel between teacher and home. The parents, as well as the teachers, needed to know that this was a reliable method of communication. One parent commented on the lack of trust in the use of the books to serve their purpose in communicating to staff:

I don't always find that what you write in the home-learning book is actually looked at or 'actioned' and so I find I can't rely on the home-communication book because I'm always slightly concerned that if I write something important in there it won't be noticed.

Expectations for how it should be used needed to be outlined in the front of the book to improve consistency across key stages. One parent showed her frustration with the lack of communication when her

child had experienced an incident in school and it wasn't communicated in writing. Many parents expressed a preference to increase the amount of communication through electronic means as exemplified in the following comments:

It'd be fantastic if you could e-mail teachers. You know, not for urgent things but say you needed something answering in the next couple of weeks or something, you know, if you could e-mail that into school that would be fantastic.

To be honest I think you're more likely to sort of read it really. I think it's worth it to send it via e-mail.

It would save all those photocopies as well. I think it would be easier to keep as well. It wouldn't get lost if it was on the computer in the same way as it would if they didn't put it in their book bags.

This data was triangulated within the survey asking parents for their preferred method of receiving written communication. The majority of responses (65%) preferred receiving that information either via e-mail (55%) or via a website (10%).

Home Learning

All of the parents commented that they played a crucial role in the learning of their children and that they were very involved with homework. However, in a survey conducted by the leadership team two years earlier, 22% of parents who responded to the survey said that they felt their children didn't receive enough homework. This was the highest negative percentage, in the survey, relating to home-school communication. Because of this, I knew it was an important part of the relationship and that areas related to homework needed to be improved. This prompted me to

investigate, within the survey, which areas the parents wanted additional advice. The following areas were identified: mathematical calculations (26%); handwriting (25%); levels of attainment (23%).

Some of the parents' comments also focused on the level of challenge within home-learning and the use of differentiation. From the interviews and discussions in the focus groups, revealed that the idea of *challenging* homework was an area parents were particularly concerned about. Therefore a question was included in the survey distributed to all parents about the challenges set for homework. The majority of parents (61.5%) felt that the level of challenge was appropriate however, more parents felt that the level of challenge was too low (28.2%) than those who felt the level of challenge was too great (10.3%). This, therefore, was an area in which the school and teachers, in partnership with the parents, could seek to achieve a better and more meaningful balance.

Potential Barriers

The barriers, as perceived by parents, were grouped into the three following themes: attitudes, access and organisation. Some parents voiced concerns about what attitudes the staff as well as other parents had about them:

Some people feel that their children may be seen as difficult and they don't necessarily want to be involved with school because their children may be seen as being a bit difficult.

Sometimes because of what other people might think. They find it difficult to be involved with school things because they feel very much that people are talking about their children.

All the groups and interviews were made up of *mothers* who had volunteered to help with the research. The absence of father-participation was note-worthy and suggested that the school needed to 'reach out' to fathers in some way. Some thought needed to be given to try and include more contact with fathers. Possibilities could include arranging: 'Fathers' Days', coaching and mentoring sessions for boys' learning and, inviting fathers in to help with the teaching of particular skills (Garner & Clough, 2008).

Lack of access was voiced mainly where both parents were employed and as a result, had to rely on childcare in order to have opportunities to meet with the school:

Well, if you're working and quite often you're working on a rota that's booked two months ahead . . . to find out about stuff that's in a week's time or two week's time means that you can't come. That's one of the biggest 'let downs' for your child.

Many of the parents were frustrated when there were organisational changes that affected their child and they weren't informed of these. A number of parents commented on the use of supply teachers and how this negatively affected their child and as a result the relationship with the school. As a result of the interviews it was clearly apparent that many of the obstacles highlighted within the literature were occurring within this setting. Consideration would, therefore, need to be given towards addressing these issues as a whole staff group.

Aligning Parents and School

The research suggested a number of areas in which the partnership could be readdressed within the school to more closely align itself with the attitudes and values of the parents. The following aspects were

devised from the findings of the research within the framework of the model proposed at the outset:

Face-to-face Contact

One possibility would be having one day, perhaps five to six times a year, which could be allocated to allow parents to come into the classroom with the child and share in some aspect of their learning. This could last for an hour and would allow the parents the opportunity to come in and share any concerns with the teacher on an informal basis as well as share in the experiences of the learning environment.

A second possibility would be to include teachers in a Parents' Forum meeting regularly throughout the year. The Parents' Forum would be a body set up outside of the PTA to have a focus on learning-issues as opposed to fund-raising (often a remit of a PTA). All parents could attend and discuss key issues within the school. Attendance of teachers could increase the realignment of attitudes and provide a discursive forum for change within each area of the school. Obviously, flexibility within the curriculum and staffing would be needed to facilitate this.

The third area where improvements could be implemented, with regard to face-to-face contact, relate to parent consultation evenings. The first aspect of these, which could be addressed, would be the timings. Some parents, especially those who worked, found it difficult to make the earlier appointments. Greater flexibility in the timings of these would allow working parents to attend. In addressing another point raised, the parents indicated a wish to discuss more than just academic attainments or targets. Perhaps the content of parent evenings should be considered within in-service training to ensure greater consistency and breadth of discussion. The final area to address,

based on the data, was the length and frequency of the consultation evenings. Providing an additional consultation evening within the year would help to bridge the current four to five month gap between meetings.

Finally, having 'coffee mornings' for groups of parents who may be 'vulnerable' in some way, would increase advocacy for potentially marginalised groups. This could involve support agencies from within the Local Authority or parent-partnership services (a voluntary organisation set up to support parents).

Written Communication

The consensus of parents supported a change in how the school communicated with the wider community. Electronic methods would not only be more cost-effective but, in considering their responses, could be more reliable than paper methods, in reaching families. This could be expanded to include important dates, curriculum details and other relevant class details which might help busy parents, especially those balancing their own work commitments.

Based on the suggestions stated thus far an action plan was devised to form part of the SIP that would address key areas in the partnership. The model proposed by Hornby (2010) was used to provide a framework for structuring the action points. Suggestions are shown in the table below:

Needs	Action
Communication	<ul style="list-style-type: none">• Increase use of electronic communication• Staff to review use of the home-school communication book to ensure consistency

Liaison	<ul style="list-style-type: none"> • Staff to review the content and timing of parent consultation meetings • Include additional meeting time once per term through 'Parental Forum' • Once per term have 'open mornings' to allow parents to participate in an activity with their child
Education	<ul style="list-style-type: none"> • Provide parents with workshops to develop their understanding of mathematical calculation, handwriting and level descriptors • Review the home-learning policy amongst staff and parents
Support	<ul style="list-style-type: none"> • Review induction process for new families joining the school • Coffee mornings for specific groups • 'Skills Days' for dads

Dissemination of this plan was initially presented within the school leadership team. As the action-points would involve the whole school community these points would later be raised for consultation with staff, families and the governing body. In order for the action plan to be successful and continue with the cycle of *Action Research*, it was vital to involve all stakeholders.

Conclusion

Often, schools may consider their procedures for involving parents *effective* without having research to support this view. Additionally, if school review systems are based solely from their own perspective, they will not gain valuable insights that parents could provide. Engaging with parents in the way the research was conducted could form a vital part of a school's evaluation process and shape a realignment of attitudes between home and school. As a result schools could begin to move from a partnership model to one that empowers parents and embraces advocacy.

The process and suggestions for improvement, outlined within this study, require a significant commitment from the leadership of a school and its staff. It cannot be assumed that this type of introspection for teachers would take place without resources being provided to investigate, implement and review. There would be implications for budgeting and also staff in-service training in order for the partnership to continue to be effective. Therefore, in most instances, the involvement of parents would feature as an element that informs every annual SIP.

Finally, it is worth practitioners considering that listening to parents is a vital part of their professional role. This may involve accepting that, in many instances, the parents may be more 'the expert' on their children than the professional. This could challenge some traditional attitudes that emphasise a more professional led partnership. Initial Teacher Education (ITE) could be used by policymakers as a vehicle for developing the skills required for self-reflection as well as developing a knowledge base for understanding the role families play in educating young people. *Action Research* could be the methodological approach that schools adopt alongside

any school improvement plan that aims to increase advocacy for families through a deeper understanding of attitudes.

Partnership between home and school can suffer from an emphasis on pupil-progress, target-setting, assessment, planning and curriculum issues. This research would suggest that the profile of this partnership should be raised and that a shared understanding of attitudes and values is an essential starting point for any area of school improvement.

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CHAPTER 14

THE SOCIAL ROLE OF GRANDPARENTS: VALUES, ATTITUDES, PURPOSES AND BEHAVIOURS

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Abstract

In recent years the role of grandparents has become the topic of several studies as many grandparents play an educational and social role in the lives of their grandchildren. The aim of the present study is to explore the role of those grandparents who share the primary responsibility in caring for and raising children. The study analyses grandparental influence in the early years of children's lives as well as their choices in respect to values, attitudes, purposes and behaviour. The study also examines the relationships grandparents have with children's parents and the different roles they play. The study was conducted in the province of Bozen, northern Italy, where three linguistic communities coexist: Italian, German and Ladin. A total of 865 grandparents completed a questionnaire on the

time spent with their grandchildren, the relationship with their own children, the approach used in raising grandchildren and the level of emotion and love involved. Results show that grandparents influence values, attitudes, purposes and behaviour in addition to being crucial to children's learning later in life; they are responsible for nourishing active participation in their social lives, fostering feelings of respect for traditions and increasing the level of consciousness in their own historical and cultural roots.

Keywords

Grandparents – Grandchildren – Upbringing children

Introduction

Despite several studies examining the relationship between parents and their children, relatively little literature is available on grandparents and their grandchildren. With falling fertility and an ageing population in Western industrialised societies, family networks are changing from broad/horizontal to narrow/vertical structures or 'beanpole families', where the role of grandparents is becoming increasingly important. In recent times this role has become the subject of several essays and investigations (Roszak, 1998; Hillman, 1999; Smith, 2002, 2004, 2005; Ferraris, 2008; Vegetti Finzi, 2008, Dozza & Cavrini, 2011).

Since the 1990s in Italy, interest has been growing regarding the role that grandparents play in the upbringing and provision of care for their grandchildren. The Italian National Institute of Statistics collected information on the presence and role of grandparents in providing care to grandchildren in a Multipurpose National Survey on Families entitled "La vita quotidiana di bambini e ragazzi" (Istat, 2008). Grandparents, who may live within or outside the family unit, are frequently the major caregivers when it comes to children. In 2008 in Italy, 6,083,000

children from 0 to 13 (78% of the total) were cared for by another adult in addition to being cared for by their parents or being at school. Compared with formal child minding services, the help of grandparents tends to be more flexible. Moreover, help is offered at no cost (Keck & Saraceno, 2008). This is not determined by a larger number of grandparents being available than in other countries, but by the geographical proximity of the family unit to at least one of its two source families and thus the availability of grandparents, in particular grandmothers, to assist in the care of the children.

In Italy the proportion of grandparents taking care of grandchildren every day is greater than in other European countries: approximately 31% every day and 47% once a week (Share Data, Survey of Health, Aging and Retirement in Europe, 2004).

Moreover, the results from studies conducted on the European Community Household Panel (ECHP) show that in families where the grandparents live with their own adult children, women work more and have more children (Del Boca, Pasqua Pronzato, 2009).

The aim of this study is to explore the role of grandparents who share the primary responsibility in caring for and raising children and to discuss how they contribute to the children's upbringing. The study analyzes grandparents' influence in the early years of the lives of children as well as their choices in respect to values, attitudes, purposes and behaviour. The study also examines the relationships grandparents have with the children's parents and the different roles they play.

In the present paper, intergenerational relationships are considered an important aspect of sociological, psychological, pedagogical/educational analysis,

bridging the micro level of family interactions within the meso and macro levels of social institutions and change (Bronfenbrenner, 1979).

From a sociological point of view, "intergenerational relations in society and in families are at the core of both continuity and change in the sense that successive generations and cohorts enter social and family systems that have been shaped by preceding generations, and then in their turn reshape them. Intergenerational relations in families are a crucial vehicle for the reproduction of norms and social values, a crucial vehicle for the reproduction of social stratification" (Saraceno, 2008).

From an anthropological point of view, intergenerational relationships in groups and in families are crucial forms for the reproduction of cultural belongings (Geertz, 1988).

From the point of view of pedagogy and psychology, papers on intergenerational relationships in communities and in families are few and the results are contrasting.

Many psychoanalysts, developmental psychologists and pedagogists highlight the great importance of grandparents in raising children, not only for the family and for grandparents themselves, but also for society (the social function of grandparents).

However, Kristine Hansen and Denise Hawkes (2009) argue that grandparents are not always the most effective means of childcare: "Many babies who are looked after by grandparents while their mothers are out at work might be better off in nurseries or crèches". They have found that grandparental care was positively associated with vocabulary test scores but also positively related to scores for behavioral problems. Children looked after by grandparents from

the age of 9 months were considered to have more behavioral problems (difficulties relating to their peers) at age 3 than those who had been in the care of a nursery, crèche, child minder, nanny or another family member.

Whether the help of grandparents' time (which is economically viable because of its zero cost) has a positive impact on upbringing, behavior and child development still remains a critical matter to be studied.

2. Methods

2.1 Data collection

The present study was conducted in the province of Bozen-Bolzano, South Tyrol, northern Italy, in which three linguistic communities coexist: Italian, German and Ladin. Confidential face-to-face structured interviews were conducted in Italian, German, and Ladin by a team of part-time interviewers who had received extensive training in the interview protocol. Responses were codified in a structured questionnaire with closed answers. Interviews were conducted between May 2004 and December 2005.

All information was collected in a 5-page questionnaire, requiring approximately 15 minutes' completion time. The questionnaire was designed to elicit information on the following: socio-demographic data, frequency of contact with grandchildren, reasons/opportunities for contact, time spent with grandchildren, emotions, feelings in the relationship with grandchildren, relationship with their sons and daughters (children's parents), educational approach, language and cultural traditions.

The socio-demographic characteristics of the grandparents considered in this study were age, gender, educational level (low if less than 5 school years; medium from 5 to 8; high if more than 8), marital status (married, widowed, separated/divorced and never married), occupational status (retired, housewife, white collar, blue-collar).

2.2. Sample

A total of 865 grandparents aged between 39 and 102, who reported having one or more grandchildren below the age of 6, took part in the study. Each participant was asked to complete a questionnaire on the amount of time spent with the children, their relationship with their own children, the approach used in raising the children and the emotions and love involved. Grandparents were selected from a cross-sectional survey conducted in South Tyrol. The sample was a two-stage stratified sample, representative of the territorial differences and the three linguistic groups.

2.3. Statistical analysis

Univariate statistics were used to describe the sample and examine the distributions of variables of interest. The association between categorical variables was assessed by a Pearson Chi-square test. We used the t test or ANOVA when the variables considered were quantitative. Stepwise logistic regressions were utilized to relate characteristics of grandparents and contacts with their grandchildren. This method was used to produce a predictive, parsimonious and accurate model because it excludes variables that do not contribute to explaining differences in the dependent variable. The significance level was defined at 5% and all statistical tests were two-sided. All analyses were performed by using STATA/SE 11.0 software (Stata Corporation, Texas, USA).

3. Results

Table 1. Demographic Characteristics of Grandparents

	Grandmother		Grandfather		<i>p</i> -value ^a
	N	%	N	%	
Characteristics of Grandparents	655	75.7	210	24.3	
Age mean (sd)	62.7 (8.2)		65.8 (7.6)		< 0.001 ^b
Age category					<0.001
39 – 54	99	15.1	13	6.2	
55 – 64	263	40.2	82	39.0	
65 – 74	183	27.9	82	39.0	
75 – 84	53	8.1	26	12.4	
85 – more	1	0.2	1	0.5	
<i>Missing data</i>	56	8.5	6	2.9	
Marital status					0.004
Married	489	74.7	181	88.7	
Widowed	123	18.8	19	9.0	
Divorced	23	3.5	4	1.9	
Never married	1	0.2	0	0	
<i>Missing data</i>	19	2.9	6	2.9	
Educational level					<0.001
Low	354	54.0	85	40.5	
Medium	224	34.2	80	38.1	
High	66	10.1	43	20.5	
<i>Missing data</i>	11	1.7	2	1.0	
Occupational status					
Housewife	253	38.6	-	-	<0.001
Retired	293	44.7	170	81.0	
White collar	54	8.3	18	8.5	
Blue-collar	45	6.9	21	10.0	
<i>Missing data</i>	10	1.5	1	0.5	

(a) all associations were tested with chi-squared test, except (b);

(b) t test.

Demographic characteristics of grandmothers and grandfathers are reported in Table 1.

More than three quarters (75.7%) of respondents were women. The mean age was 63.5 (SD = 8.2;

range 39-102). There were important differences between grandmothers and grandfathers. Grandmothers ranged from 39 to 102 years of age, while grandfathers ranged from 44 to 93. Women had a lower percentage of higher education levels than men (10.1% to 20.5%). The majority of respondents (77.5%) were married and 12.6% only had a high school education. Approximately 16% of the sample was working; 18.5% of males and 15.1% of females.

There was a significantly higher number of retired males compared to retired females, though if we sum housewives and retired females the proportion becomes more equal. The respondents had an average of just over four grandchildren, and the number of grandchildren ranged from 1 to 26. Respondents aged 65 years and over had an average of 5.5 grandchildren, whereas those aged under 65 had an average of three grandchildren

3.1 Relationship with grandchildren's parents

3.1.1 How is the relationship with the parents of your grandchildren?

As shown in Table 2, the relationship between parents and grandparents is mostly cooperative in the Ladin language group (83.58%) and in the German one (80.53%). The Italian grandmothers and grandfathers were at 58.6% with 36.8% indicating mutual respect with a slightly higher percentage of conflict compared to the German group.

In general, the data collected with this question show the correlation between language group and type of relationship between parents and grandparents to be very significant. In contrast, the correlation between gender and relationship with parents is not significant. We can see a small minority of grandparents indicating

a conflictual relationship, but also a great majority showing respect. Grandmothers showed a more cooperative relationship when compared with grandfathers.

The association between age and relationship with parents is not significant. Both grandmothers and grandfathers are involved in the care of children, albeit with a higher number of grandmothers, especially under the age of 65. Grandfathers and grandmothers over 65 years seem to share less responsibility and move the relationship a little more towards mutual respect, sometimes with conflict. One might assume that parents, being older, are now more self-sufficient, and even when there are great-grandchildren, great-grandparents feel less able to be leaders and/or they perceive themselves as such.

3.1.2 How do you feel about parents?

If we ask how the grandparents relate to the children's parents, we see that German (81.4%) and Latin (75.8%) grandparents seem to feel more free to have their say and act, while this is only true for 57.4% of Italians. If we look at aggregate data for the language group, but differentiated by gender, results are confirmed and they strengthen the data for more active involvement by grandmothers, who feel more free to express their opinion in the upbringing of children (78.1% compared to 66.2% for grandfathers). It also confirms the trend already indicated above with respect to those over 65, a higher percentage feel compelled to adhere more to what the parents of grandchildren request. The correlation between the respect given to parents and language group and sex are also very significant, whereas age does not show a significant association (Table 2).

3.1.3 Do you think that the parents of your grandchildren...

The variable "What do you think of the parents" is not associated with any of the three variables considered (language group, gender and age). The majority of grandparents believe that parents discipline or instruct their grandchildren in good manners and instil good behaviour in their grandchildren, even if the grandmothers and those over 65 would like to impose more rules (Table 2).

Table 2. Relationship with the parents of your grandchildren

	German	Italian	Ladin
	N (%)	N (%)	N (%)
How is the relationship with the parents of your grandchildren?			
<i>Highly respectful of each other</i>	96 (16.8)	71 (36.8)	8 (11.9)
<i>Very cooperative</i>	459 (80.5)	113 (58.6)	56 (83.6)
<i>Conflictual</i>	15 (2.6)	9 (4.7)	3 (4.5)
How do you feel with the parents of your grandchildren?			
<i>Free to have your say and to intervene</i>	445 (81.4)	112 (57.4)	50 (75.8)
<i>Compelled to do what they ask</i>	102 (18.7)	83 (42.6)	16 (24.2)
Do you think that the parents of your grandchildren			
<i>Impose too many rules / demand too much.</i>	22 (3.8)	10 (5.0)	5 (7.4)
<i>Impose too few rules / are too permissive.</i>	105 (18.3)	36 (18.1)	13 (19.1)
<i>Discipline the children well.</i>	447 (77.9)	153 (76.9)	50 (73.5)

3.2 Disciplinary and social behaviour choices

3.2.1 You want your grandchildren...

A total of 50% of grandparents would like their grandchildren to know how to play with and get along well with other children, with no difference between languages. 27% of the Italian grandparents think that their grandchildren should learn to listen when something is being explained to them, while 30% of

the German and Ladin grandparents think that their grandchildren need to learn to be more self-sufficient and more independent in their actions (Table 3).

Table 3. Disciplinary and social behaviour choices

	German	Italian	Ladin
	N (%)	N (%)	N (%)
You want your grandchildren:			
<i>To know how to play with and get along well with other children</i>	295 (51.8)	103 (53.9)	34 (50.0)
<i>To learn to be more self-sufficient, more independent in their activities</i>	168 (29.5)	36 (18.8)	22 (32.4)
<i>To learn to listen when you explain things to them</i>	107 (18.8)	52 (27.2)	12 (17.6)
If children violate the rules or offend			
<i>You would like the parents to reproach them only verbally</i>	329 (59.2)	139 (69.8)	40 (59.7)
<i>You would like their parents to spank them</i>	227 (40.8)	60 (30.2)	27 (40.3)
If your grandchild is unmanageable or out of control, what do you do?			
<i>I try to please him as much as possible</i>	35 (6.0)	8 (4.0)	6 (8.7)
<i>I explain things, I speak to him, I try to convince him</i>	309 (53.7)	163 (81.5)	48 (69.6)
<i>I am inflexible and say firmly "no"</i>	232 (40.3)	29 (14.5)	15 (21.7)
How should a child be dressed?			
<i>In a very simple and practical way to move well and play freely</i>	567 (97.9)	196 (98.0)	68 (97.1)
<i>I like him to be well dressed and fashionable</i>	12 (2.1)	4 (2.0)	2 (2.9)
What are the eating habits of your grandchild?			
<i>Healthy and balanced</i>	430 (75.3)	142 (71.4)	58 (85.3)
<i>He is always hungry, eats too much</i>	23 (4.0)	4 (2.0)	0 (0.0)
<i>He/she only eats certain foods; it should be insisted that he/she taste new foods</i>	101 (17.7)	48 (24.1)	5 (7.4)
<i>Consumes too many snacks and packaged foods</i>	17 (3.0)	5 (2.5)	5 (7.4)

3.2.2 If children violate the rules or behave offensively or uncontrollably

If children violate the rules or behave badly, the majority of grandparents prefer parents to only reproach them verbally, but there are some differences between the Italian (69.8%) German (59.2%) and Ladin (59.7) groups. German and Ladin grandparents are favourable to mild spanking. When grandchildren get angry, Italian grandparents tend to explain things, speak to the children and try to convince them to change their minds. German grandparents tend to be more inflexible and firmly say “no”.

3.2.3 Clothes and eating habits

The majority of grandparents think that grandchildren should be dressed in a very simple and practical way to be able to move around with ease and play freely. Ladin grandparents indicated that their grandchildren had healthy and balanced eating habits. Moreover, 24% of Italian grandparents think that their grandchildren eat only certain foods. This indicates that they might consider their grandchildren to be spoiled.

3.3 Contacts between grandparents and grandchildren

Participants were asked how often they had contact with each of their grandchildren. The possible answers were ‘Less than once a week’, ‘Once a week’, ‘Two or three times a week’ and ‘More than three times a week’.

We found that nearly 6.6% of the grandparents said they had less than one contact per week. A total of 57% of the grandmothers and 60% of the grandfathers indicated approximately daily contact. No

significant differences between the degree of contact with grandchildren among grandmothers and grandfathers was found. The degree of contact with grandchildren was found to vary with the age of the grandparents. Younger grandparents tend to have more contact with all their grandchildren than older ones. The main reason for this more frequent contact is that the parents work and the grandparents have responsibility for their care.

Grandparents and grandchildren did all sorts of things together, such as playing games (69%), watching TV or videos (14%) and reading books (14%).

Uhlenberg and Hammill (1998) found six factors predicting contact between grandparents and grandchildren; geographic proximity was the strongest, followed by the quality of the parent-grandparent relationship. In our study we found that 76 per cent of grandparents have contact several times a week if they live less than 1 km away from the grandchild. This percentage decreases to 17% if they live between 1 and 5 km away, and is 7% if they live more than 5 km away. The frequency of contact seems to be influenced by the quality of the parent-grandparent relationship. In fact, the percentage of more than 3 times a week decreases to 37% if there is some conflict in the relationship. Television and children's books often portray grandparents as aged, fussy and sedentary (Janelli and Sorge, 2001) but in our case, nearly 15% of the children who read books had grandparents under 65.

After creating a new variable codified in 1 'Less than three times a week' and 0 'More than three times a week', a logistic regression was estimated for new variables considering gender, age of grandparents, living arrangements (in the same building, less than 1 km, between 1 to 5 km, more than 5 km), number of

grandchildren, number of grandchildren under 6 years of age, granting custody of the children (yes/no) and rapport with parents as covariates. The variables were chosen in accordance with the literature, in particular considering Uhlenberg and Hammill (1998), as cited before. The results are reported in table 4.

Table 4. Logistic Regression of contacts

Variables	OR	95% IC	p-value
Gender			
Female (vs. Male)	1.31	(0.86 – 1.99)	0.207
Age			
65 years and over (vs. <65)	1.97	(1.33 – 2.94)	0.001
Working			
Yes (vs. No)	1.60	(0.98 – 2.61)	0.059
House (vs. Cohabitation)			
In the same building	0.460	(0.19 – 1.10)	0.081
Less than 1 km	2.892	(1.39 – 6.01)	0.004
Between 1 to 5 km	5.880	(2.79 – 12.40)	0.000
More than 5 km	17.882	(8.17 – 39.15)	0.000
Total grandchildren	1.07	(1.01 – 1.14)	0.014
Taking care of grandchildren			
Yes (vs. No)	5.46	(1.58 – 18.90)	0.007

Only the significant variables and gender are reported in the table. The logistic regression shows the absence of a statistical association between gender, educational level, rapport with parents and the level of contact with grandchildren. In contrast, the age of grandparents was significant. The risk of seeing their grandchildren less than three times a week is double for older grandparents. Working, living more than 5 kilometres away and having more grandchildren increased the risk of seeing their grandchildren to less than three times a week. We also considered the effects of grandchildren's age in the model because the frequency of contacts could be related to the age of grandchildren. But this variable was not statistically significant. This was an expected result because the

inclusion criteria in this study was that grandparents had at least one grandchild aged 6 years or less.

Conclusion

Grandparents play an upbringing role and, mainly in the area of Mediterranean countries (Bernhard, 2005; Sgritta, 2006), a social role. The overall picture presented in this study is that most grandparents in South Tyrol have quite frequent contact with their grandchildren.

In our study we highlighted very different behaviour from the European data (Dench & Ogg, 2002). As reported by Kohli et al. (2005), in Northern and Central European Countries approximately 70% of grandparents reported contacts at least several times a week, whereas in the Mediterranean countries this percentage is 95% or more. Italian grandparents reported seeing their grandchildren more than three times a week. Almost all the grandparents in the study have contact with one or more of their grandchildren every week or even daily. Differences in contact frequency may be explained by the age of the grandparents. The number of grandchildren and distance were found to be important determinants.

The relationship between parents and grandparents is mostly cooperative in the Ladin and German language groups. German and Ladin grandparents seem to feel more free to have their say and act, whereas this is less true for Italians. Grandmothers are more involved in the relationship and feel more free to express opinions in the upbringing of children. All grandparents believe that parents raise their grandchildren well, even if grandmothers and those over 65 would like to impose a few more rules.

German and Ladin grandparents believe that grandchildren need to learn to be more self-sufficient and more independent in their own activities.

The majority of grandparents prefer that parents only reproach grandchildren verbally. German and Ladin grandparents are more inflexible. Disciplinary differences are reflected in eating habits. Mainly Ladin, but also German, grandparents, indicated that their grandchildren had healthy and balanced eating habits, whereas a significant number of Italian grandparents indicated that their grandchildren eat only certain foods, inferring what they might believe to be a higher percentage of spoiled children.

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SECTION 3

COMMUNITY INVOLVEMENT AND EDUCATION POLICY

Section 3 Contents

Chapter 15	423
Improving Schools Through Democratic Stakeholder Involvement <i>Martin Retzl & Roland Ernst</i>	
Chapter 16	437
The “Free” Child – Organized After School Activities as the Upbringing of a Community <i>Ann S. Pihlgren & Malin Rohlin</i>	
Chapter 17	477
Exercising an Ethic of Care: Mississippi School Leaders' Responses to Hurricane Katrina <i>Judith A. Gouwens & Donna Lander</i>	
Chapter 18	495
Service learning in a Croatian University: A Possibility for Effective Partnership with Community Stakeholders <i>Nives Mikelic Preradovic, Sanja Kisicek & Damir Boras</i>	

Chapter 19 **521**
Innovation and Cooperation Between Business and
Universities: Comparative Analysis and Educational
Implications
Cajide Val, J. & García Antelo, B.

Chapter 20 **557**
The Socioeconomic Impact of a HEI for a Local Economy
Joana Fernandes, Jorge Cunha & Pedro Oliveira

Chapter 21 **577**
The Higher Education Premium as a Measure of Regional
Development
Joana Fernandes, Jorge Cunha & Pedro Oliveira

CHAPTER 15

IMPROVING SCHOOLS THROUGH DEMOCRATIC STAKEHOLDER INVOLVEMENT

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Abstract

Due to rising scepticism on standards and choice as tools for improving schools, the present paper offers an account of research aimed at discovering if, and to what degree, the needs of schools and the strategies suggested for meeting such needs differ. Drawing on John Dewey's democratic ideal and considering research revealing that context specificity and social relations are decisive factors for school reform, the present contribution offers a framework for school improvement. The methodological approach presented in the paper combines elements of the "Delphi-Method" and of deliberative problem-solving methods whereby all the teachers, pupils and parents of a school, as well as community representatives, are, through questionnaires, continually made aware of each other's thoughts and suggestions on schooling and instruction, thus enabling the development of concrete on-site action strategies. Thus far, findings from two schools operating under different socioeconomic conditions suggest that systematic stakeholder involvement can reveal several context-specific needs and the strategies to meet them.

Keywords

Educational Change – Democratic Involvement – John Dewey

1. Failure of current school reforms

“We need a new vision of school reform because our reform efforts since *A Nation at Risk* (National Commission on Excellence in Education 1983) have largely failed, and they have exhausted their resources for renewal” (Strike 2010: 4). According to Strike, inappropriate education reforms over the last 20 years can be grouped into two main categories: “standards and accountability” and “choice”. Both focus primarily on the logic of motivating behaviour through incentives. Whereas the former build on rewards and penalties regulated by the government, and the latter on market competition, they are both quite similar in that a) they erode “community” by centralizing authority and disregarding evaluation by teachers and school leaders, and b) they seem likely to increase the “alienation” of pupils and teachers and to erode authentic teaching (Strike 2010: 4ff). This sceptical view seems to be shared by a growing number of scholars who considered the consequences and effects of obligatory US-wide high-stakes testing following the enactment of “NCLB” in 2001 to be disillusioning (see Deretchin & Craig 2007; Shirley & Hargreaves 2007; Cuban & Torres 2008; Amrein-Beardsley 2009; Elmore 2003; Nichols & Berliner 2007a, 2007b; Rothstein, Jacobson & Wilder 2008).

In addition to Strike’s credo, evidence shows that school reform needs to focus on the school, its embeddedness in the community, and its social relations. Findings show that a school’s functioning or malfunctioning, as well as the success of improvement strategies, very much depend on specific contextual circumstances, and differ from school to school (see Thrupp & Lupton 2006; Potter & Reynolds 2002; Harris

& Chapman 2004); findings also show that social relations between teachers, between teachers and pupils, and between actors within a school and actors those within the school's environment constitute a decisive factor in the quality of schools (see Oswald et al. 1989; Fend 1977; Marcoulides et al. 2005; Smith 2006; Sanders & Epstein 1998; Henderson & Mapp 2002). Hence it would seem that reliance on "one-size-fits-all" reforms and change strategies implemented from outside (see Gross et al. 2009) should be avoided.

2. Other ways of improving schools

The question arises as to whether there are other ways of improving schooling and serving the public good. A possible answer may lie in an empirical school-improvement approach that builds on the fundamental principles of Dewey's theory. Those principles offer a foundation for context-sensitive and democratic engagement by the school, the families of the pupils, and by the community, for improving the school's quality. This contrasts with the logic of current reform approaches, which relies on top-down pressure and control through standards and achievement testing, or on market-based competition that forces people "to abandon their neighbourhood school as quickly as they might switch between telephone companies or brands of soda", as Fung pointedly describes the situation (Fung 2004: 10).

Dewey considers education to be "a social function, securing direction and development in the immature through their participation in the life of the group to which they belong..." (Dewey 1916: 94). Schools, therefore, should provide an "embryonic community life, active with types of occupations that reflect the larger society..." (Dewey 1915: 29).

Democratically constituted societies are characterised by:

1. more numerous and more varied points of shared common interest;
2. recognition of mutual interests as a factor in social control;
3. freer interaction between social groups;
4. continuous readjustment of social habit through meeting the new situations produced by varied intercourse (Dewey 1916: 100).

Hence, a logical conclusion would seem to be that the educational task of schools in democratic societies is to provide children with the experience of democratic principles so that individuals thus educated can embrace those principles (Dewey 1916: 115). A democratic society is even more interested in deliberate and systematic education than other societies for several reasons (Dewey 1916: 100f). A very important one is that "democracy is more than a form of government; it is primarily a mode of associated living, of conjoint communicated experience" (Dewey 1916: 101). This mode of living exposes

people to "a greater diversity of stimuli" to which they have to respond. This consequently puts "a premium on variation" on the individual's action (Dewey 1916: 101). "It is a matter of deliberate effort to sustain and extend" a democratic society in which the merging of "greater individualization on the one hand and a broader community of interest on the other have come into existence" (Dewey 1916: 101).

Thus, in a democracy schools as embryonic communities reflecting the larger society should aim to provide individuals with "democratic living skills" by fostering appropriate experiences.

In "The School and Society" Dewey criticises the former "traditional" school system as not appropriate for preparing people for a "new" society. "The mere absorbing of facts and truths is so exclusively individual an affair that it tends very naturally to pass into selfishness" (Dewey 1915: 15) "Where the school work consists in simply learning lessons, mutual assistance, instead of being the most natural form of cooperation and association, becomes a clandestine effort to relieve one's neighbor of his proper duties" (Dewey 1915: 16). Dewey makes the point that the traditional way of learning at school does not have any "social motive" and offers no "social gain". The only "measure for success is a competitive one, in the bad sense of that term - a comparison of results in the recitation or in the examination to see which child has succeeded in getting ahead of others in storing up, in accumulating, the maximum of information" (Dewey 1915: 16).

However, since a democratic society is characterized by "working along common lines", "in a common spirit", "with reference to common aims" and as "the common needs and change demand a growing interchange of thought and growing unity of sympathetic feeling" (Dewey 1915: 14), it would seem obvious that schools should foster attitudes and promote skills that enable people to act in a democratic manner.

Even though Dewey's critique was expressed a century ago and thus refers to a former school system and society, one can see parallels, if not detrimental effects, in the situation prevailing today. Not only pupils have to compete with each other, schools, too, are being forced to compete more and more.. As the success of schools is measured by gains in the test scores of their pupils, Dewey's critique of the focus on narrow and individual examination results and the

consequent selfishness goes beyond the classroom to the schools themselves and extends to the whole school system. The erosion of teaching and learning, as well as its unintended side effects, seems to increasingly impede schools from being embryonic communities that provide social experiences for for the acquisition of the attitudes and skills necessary for becoming active members of a democratic society.

2.1 Methodology

The fundamental principles of Dewey's educational philosophy were introduced into the empirical multi-stage research process of an official Austrian research project (NOESIS-School Settings) carried out in Lower Austria. With a view to educational change, the project builds on the "democratic ideal" and on "community and context", , thus challenging the "standards and accountability" or "choice" logic. Through school reform efforts and educational change initiatives the project aims to (re)establish community (context) and the democratic ideal by applying a research design considering:

- a) the principals, teachers, parents, pupils and community representatives, and their numerous and varied points of shared common interest;
 - b) the recognition of the interests of the principals, teachers, parents, pupils and community representatives as a factor in social control;
- and enabling:
- c) interaction between the principals, teachers, parents, pupils and community representatives;
 - d) the readjustment of social habit through meeting new situations engendered by intercommunication between teachers, parents, pupils and community representatives.

2.2 Research Design

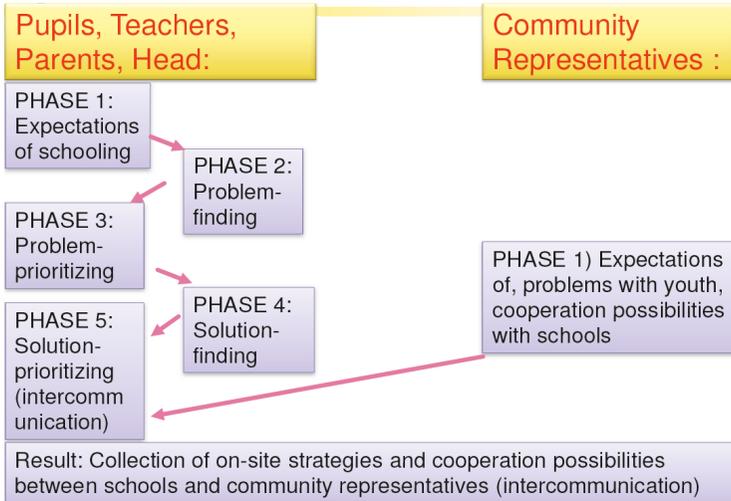
In a case study approach running from 2010 to 2013, four schools at secondary level 1 (“Hauptschule”) in different social settings and communities within Austria were selected. Selection criteria comprised the socioeconomic background conditions of the school community, the location of the school (urban/rural) and the size of the school. All selected schools are participating in an evaluation and school-improvement project (NOESIS) together with an official school trial on organizational and instructional changes. Thus, the schools were aware that they would be approached by a research team. So far, one small, urban school (150 pupils) with low socioeconomic background conditions and one large, rural school (350 pupils) with high socioeconomic background conditions have been approached by the research team, have been informed about the process and have agreed to participate.

The following research design is applicable up to the end of the project. School data (pupils, teaching staff, infrastructure, etc.) and community data (socioeconomic conditions, population, job market, housing, etc.) are collected from every selected school site. An original five-phase data-gathering process is applied combining principles of the Delphi-Method (see e.g. Seeger 1979; Haeder & Haeder 2000; Linstone & Turoff 1975) and elements of deliberative problem-solving methods (Fung 2004: 58ff).

In this process the principal/head, teachers, pupils and parents define what is important for good schooling and instruction (phase 1); define specific on-site challenges and problems (phase 2); identify the most important challenges and problems (phase 3); suggest solutions for the most important challenges and problems (phase 4); and agree on appropriate solutions (phase 5).

Moreover, the community representatives and the teaching staff communicate with each other on possible means of cooperation considered to be helpful for better coping with challenges and problems on site.

Design of the Research Process



In this respect, the following questions are to be answered:

- 1) to what extent do schools operating under different contextual conditions differ in their needs.
- 2) to what extent do schools operating under different contextual conditions develop different strategies for improvement .
- 3) Are there correlations between the specific conditions under which schools operate and the specific needs of those schools.

Every phase is completed by using questionnaires that in phases 1, 2 and 4 mainly consist of qualitative elements (open-ended questions) and in phases 3 and 5 of quantitative ones (closed questions). Community representatives are representatively selected based on an online survey (open-ended questions). The open-ended questions allow participants to freely indicate

their expectations, perceived problems, as well as their suggestions and ideas for solving any problems and achieving their expectations. The closed questions in phases 3 and 5, intended to elicit an indication of problems, as well as suggestions allow the respondents to express their agreement or disagreement on each single item on a six-level Likert-scale. The research team designs successive questionnaires based on the answers and comments of the participants, thus ensuring that every comment is taken into account.

Questionnaires form the data source on which the research is mainly based for three main reasons:

- 1) The research design requires quick and easy data analysis procedures since the results of the data-gathering process in one phase have to be considered as the instruments for the data-gathering procedure of the following phase.
- 2) Distributing questionnaires to every student, parent, teacher and the principal in every phase makes it possible to involve the whole school in the process over a longer period of time. Since each subsequent questionnaire contains questions based on the comments in preceding questionnaires, questionnaire format used allows for adequately and conveniently informing every single person about the results of the preceding phase and for inviting every single person to participate in each subsequent phase.
- 3) Common criticism of deliberative forms of democracy, which purports that culturally privileged groups silence or dominate others as they may be able to better express their interests in public (see Young 1996: 122f), is countered by this mode of inquiry. Everyone can express his or her opinion a) anonymously, b) by choosing freely when they do so and how much time and effort they devote to the questionnaire (with the exception of pupils, who are expected to respond during class), and c) have the guarantee that each voice is considered equally.

Furthermore, data available on the school and the school community serve as a basis for understanding the specific conditions under which a given school is operating.

3. Conclusions

On completion of the process in two secondary schools in Lower Austria, emergent findings show that participation rates in both schools, despite different socioeconomic-background conditions, were very similar (a minimum of over 90% of the pupils, 70% of the teachers and over 60% of the parents participated in at least one phase). In the rural school operating under higher socioeconomic background conditions (SES), the main issues raised dealt with the improvement of a generally well-functioning school life, such as organizational changes, more variety in instruction and in the subjects offered or better communication and cooperation within the teaching staff. In the urban school operating under lower SES background conditions, the main issues raised dealt with providing elementary preconditions for teaching and learning and compensating for family deficits. This comprised common efforts to change the basic manners and attitudes of the children, agreements between parents and teachers, and between pupils and teachers, on appropriate behaviour and consequences for misconduct, as well as cooperation between the school and community representatives for providing social and psychological support.

Although generalizable conclusions cannot be drawn yet, the findings suggest that a context-specific focus considering the interests of all stakeholders allows for identifying the varying needs of schools and thus seems to be a promising way of not only solving immediate problems on site, but also of producing sound information for school administration and policy makers for reforming schools more successfully.

A methodological approach building on Dewey's democratic ideal considers community as well as the contextual circumstances under which a school is operating as the origin for successful educational change and school reform. The research offers an alternative in the field as it significantly differs from the prevailing logic of market-based competition or top-down pressure and control and builds on (re-) establishing a common spirit and community for the purposes of improving education.

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CHAPTER 16

THE "FREE" CHILD – ORGANIZED AFTER SCHOOL ACTIVITIES AS THE UPBRINGING OF A COMMUNITY

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Abstract

Afterschool activities were introduced in Sweden to control begging and criminality among lower class children. *Arbetsstugor* ('work cottages') were the first of a series of institutions, with the objective to contribute to children's moral education and readiness to work. The modern leisure-time center, *fritids*, is attended by most children age 6-9 years old, and is a part of the Swedish school system. This paper investigates the values and interests forming children's time outside the compulsory school day when subject to attempted control. The written historical sources are combined with analyses of pedagogical intentions in the curricula of the era and of the prevailing view of children. The result shows that the way the pedagogical identity of the institutions was conceptualized was highly dependent on the governmental idea of what social problem it was intended to solve. This differs over time and hence - so does

the pedagogical undertaking, leaving today's *fritids* in a turmoil of contradictory influences. As these institutions were less subject to societal directives compared to the school curriculum, teachers had a heavy influence on the practical outcome of the *fritids'* activities and these were also more susceptible to the current societal idea of what constitutes childhood.

Keywords

Fritids pedagogues – afterschool activities – curriculum – ideal child – fundamental values

Introduction

As P. P. Blonsky has stated, 'Behavior can be understood only as the history of behavior'./--/ Thus, the historical study of behavior is not an auxiliary aspect of theoretical study, but rather forms its very base.

Lev S. Vygotskij in Mind in Society.

Approximately a hundred years ago, afterschool activities were introduced in Sweden as means to control begging and criminality among lower class children when leaving school in the afternoon, a quickly escalating problem in the growing cities (Rohlin, 1996). These institutions were the first of a series of institutions, with the objective to keep children off the streets and to contribute to their moral education and readiness to work.

The modern institution is called *fritidshem*, or *fritids*, and literally translated 'free-time home'. In official documents by the Swedish National Agency for Education (Skolverket) the English translation is 'leisure-time center' (Skolverket, 2007). In this text the shorter Swedish term *fritids* will be used.

Today, *fritids* is, although subject to parents' choice, attended by most children age 6-9 years of age, and is

considered a part of the Swedish school system. However, reports from the Swedish supervisory authorities the Swedish National Agency for Education/Swedish Schools Inspectorate (2000, 2005, 2010) have over the last decennium shown that many of the *fritids* did not succeed with their mandate. The inspectors establish that through the years children at most *fritids* are given space for their own playing activities, but they also state that the organisation often is static and not based on the children's different needs and interests. The children often have no real influence on planning and the organisation does not systematically support the children's intellectual development and learning. The reports also give an indication that there are uncertainties regarding the goals of *fritids* and the role of *fritids* pedagogues, as well as an absence of professional language. The reports, as well as local municipal assessments of *fritids* organization (2006-2009) also indicate the lack of educated *fritids* pedagogues in recent years has been troublesome for employers, there in most cases being fewer certified pedagogues than for example within pre-school and school organizations. How can this information be interpreted?

The topic of this paper is the values and interests over time, which formed and governed the afterschool activities supported by the government but not subject to legislation or curricular directives. This is also what constitutes the general interest in the paper; it explores a vital area – children's time off school when this is subject to attempted control. The *fritids* is a Swedish conception, but the pedagogical history influencing the activities has its correspondence in other countries, as have afterschool activities.

1. Understanding the Organization in Light of History

Lev S. Vygotsky (1930/1978) reflects in *Mind in Society* on the different problems that the researcher is confronted with, when studying human activities and actions. He states that it is hard to find explanations through experiments and observations if you are to examine higher, human forms of actions and behavior, since these are very complex. A dialectic approach connotes an assumption that man is influenced by the surrounding context and nature but that man also influences and changes the context and thereby creates new natural predispositions for his existence. According to Vygotsky (1930/1978), this means that research ought to analyze processes rather than objects, ought to explain rather than describe, and ought to enlighten every part of a practice in the light of history. This should specifically be applied to practices that has been "fossilized" by a period of long historical development, and that have frozen into a mechanized state, making its inner nature hard to study by taking the outer shape alone into account. Inspired by Lev Vygotsky's theoretical frame, this study will throw some historical light on the practice of the *fritids*, a search of the practices' formal and informal intentions and goals, and their practical outcome.

1.2. Research questions and method

This is a study of written historical sources merged with analysis of pedagogical intentions in the context of the curricula of the era and the prevailing view of children. The objective is to investigate and analyze the formal and informal intentions and goals in community-organized afterschool activities, developing in Sweden through the 20th century and resulting in the contemporary *fritids* provided by the community, as well as their practical outcome. Our particular

interest is what fundamental values emerge at different historical periods.

Research questions are:

- What and whose intentions informed the activities during different periods of the afterschool activities:
 - What values were the *fritids* and their predecessors supposed to fulfill?
 - In what practical pedagogical context were these values carried out? What ideal child was aspired to?

Historical sources have been studied: governmental official texts about the afterschool activities (cf. SOU 1938-2008), official material, newsletters, and books from active teachers and preschool teachers and their unions (cf. Hierta Retzius, 1897; Olsson, 1926; Carlgren, 2001), school curricula and other directives (cf. Skolverket [Swedish National Authority for Education], 1994, 2007; Skolöverstyrelsen [Swedish National Authority for Education] 1969, 1980), and to some extent literature and material produced for children during the period. The findings were compared to and merged with research (cf. Aries, 1960; Englund, 2008; Hansen, 1999; Lindensjö & Lundgren, 2000; Sidebäck, 1992, Tallberg Broman, 1991). The study concentrated on four periods of time and their institutions: the 1880's and work cottages (literal translation of 'arbetsstugor'), the 1930's and afternoon centres ('eftermiddagshem'), the 1960's and the late 1990's and the *fritids*.

To some extent the study rests on the authors' doctoral theses, which both include literature studies (cf. Pihlgren, 2008, Rohlin, 2001). However, this study uses the material in new ways and combined with new sources and with a different theoretical approach. In Ann S. Pihlgren's (2008) thesis, a phenomenological theoretical approach was used, whereas Malin Rohlin's

(2001) thesis built on a contemporary historical perspective inspired by Michael Foucault (1993).

1.3. Fundamental Values

Our study deals with which values are ascribed to the *fritids* and which it has conveyed during different periods, its fundamental values. The concept *fundamental values* [*värdegrund*] is relatively new in Swedish vocabulary, it came into use in the study preceding the national curriculum 1994 (*SOU 1992:94*)¹. The concept has since then spread to other areas of society and is now often used to characterize the values desired to be adapted by everyone within a particular group.

The concept occurred when western society began to notice an ongoing change within society, from norms and values which had been seen as common for all of society to less static and predictable norms (Bäckström et. al. 2004, Friedman, 2005). European society today consists of a number of different groups with different fundamental values and thoughts about what is correct and proper behavior. The official values differ somewhat between the European countries. A comparison of the Swedish curriculum's (Swedish National Agency for Education, 2011) fundamental values and the present Austrian curriculum's (BGBI, 2005) equivalent to fundamental values shows both differences as well as similarities. As an example, the Austrian curriculum expresses that the school shall contribute to children's development of moral and religious values (something that is not expressed in the Swedish curriculum), but also to democratic and

¹ The word has been in usage since 1992 and appears in The Swedish Academy Glossary from 2006 (Berg, D. Research Assistant, Lexikala institutet, SAOL-editorial staff, 2010).

social values (also emphasized in the Swedish curriculum).

It is in other words difficult to identify fundamental values (Hedin & Lahdenperä, 2002). Despite this an official interpretation takes precedence, an official social desire to foster citizens of tomorrow, embracing specific values. Even if the Swedish concept *fundamental values* did not exist before 1992, it is reasonable to assume that attempts were made to convey an official set of 'fundamental' values through *fritids* and their predecessors, and that such a set of fundamental values can have shifted with time (cf. Rohlin, 1996).

Our theme set out above is dealt with in four sections, each having the perspective of one of the four historical time periods in the history of *fritids*, where the organization, its pedagogical social function and developmental psychological basis and notions concerning the ideal child are discussed. The sections will subsequently be analyzed and discussed together. To conclude we will reflect over the development of the immediate future.

2. Children, the *Fritids*, and the Ideas

In the steering documents that govern the *fritids* today it is assumed that the child is a free individual in the sense of being an active and creative being that decides over its own life conditions.

Children are constant active co-creators of their own development and their own learning both in play as well as in creative activity such as the exploration of the surrounding world.

Kvalitet i fritidshem (Skolverket, 2007), s. 16 (authors' translation).

Such a notion of children and their abilities and rights, however, is far from being obvious. 'The child' as a construction is a historically new phenomenon; people during the late medieval period seemed to have an awareness of children as something separate from adults (Ariès, 1960). Early thoughts about the child as having its own right to live or being included within certain rights e.g. living in a family or going to school can be traced back to the 1500's. The child's physical and cognitive development was studied more systematically during the Enlightenment of the 1700's, which led to the strengthened notion of children and childhood as a specific concept. During the twentieth century the debate about children's living conditions took off and the thought of children having rights got practical consequences. Ellen Key (Key & Stafseng, 1900/1996) stated in her book *The Century of the Child* that the legislation in force at the turn of the twentieth century, that allowed child labor and corporal punishment of children, denied children their right to be children. Elisabeth Englund (2008) maintains that children's conditions in Sweden successively have strengthened, as they have in Europe, from aspirations during the 1910's to decrease child mortality rate through improved conditions and health care service, to the improved family politics of the 1930's which had child rearing as its focus, and to the 1970's focus on the child's development.

The rise of the concept of modern childhood is connected to the development towards an industrial society, where the professionalization and the need of abstract knowledge demanded schooling (Dahl in Aronsson et al., 1992). With this came an accentuated interest in affecting the child's disposition in a "desirable" direction (Sidebäck, 1992).

2.1. Work cottages around 1900 – the Social Idea and the Employment Idea

The elementary school reform in Sweden with statutory schooling for all younger children went through in 1842, but structured schooling for all children did not become a reality until 1880's, when a school law and a curriculum for elementary school was decided in 1878 (Sandin in Aronsson et al., 1992). Labor for children under 12 years old was forbidden in 1881 (Olsson in Aronsson et al., 1992)². Children were no longer required in production, partly as the public debate on child labor had been extensive, partly as production became more technically refined. Children were now to a larger extent maintaining themselves on the streets. The bourgeoisie worried about children and youths becoming uncivilized, which led to different initiatives, principally taken by philanthropists³. One of the practical results was 'work cottages', to which Fridtjuv Berg is considered to have inspired and Anna Hierta-Retzius the one who formed the content. The work cottages can be seen as a type of predecessor to today's *fritids* (Rohlin, 2001)⁴.

² In 1881 child labor had been abolished for children under 12 years old, but children aged 12-14 were permitted to work six hours and youths 14-18 years old ten hours a day (Olsson in Aronsson et al., 1992).

³ Philanthropy can be described as a strategy for the support of the less fortunate. It was a matter of giving advices as to how life should be lived, a type of help for self-help, instead of help in the form of gifts. Both Fridtjuv Berg and Anna Hierta-Retzius can be considered a part of the philanthropist fundamental idea (Rohlin, 2001).

⁴ In the dissertation "Governing in the Name of Children's Leisure Time" [*Att styra i namn av barns fritid*](Rohlin, 2001) a contemporary historical perspective was used, inspired by Michael Foucault (1993). The relationship between the wielding of power and the knowledge of the object that shall be governed is central. The analysis is made there against the background of three actors: the state (as an arena for different actors), the union organisations as well as the professionals themselves. In the dissertation three different time periods emerged which were entitled "the social

The work cottages were described in *Swedish teacher's magazine* during the later part of the 1880's as "complementary institutions to the cities' elementary schools" (Svensk lärartidning no 46, 1888). The activities there were related to labor in some way. Children learned to make brushes, weave baskets, and to produce other articles for everyday use (Rohlin, 2001). As the organization developed story-times, games and play were introduced. Even small-scale lending libraries within or near the work cottages were started. The idea of connecting support for children being connected to labor recurred in a modified form in school, for example school gardens and handicraft (Hierta-Retzius, 1897, Trotzig, 1989).

Philanthropists, junior school teachers, elementary school teachers, and vocational teachers worked within the work cottages (Rohlin, 2001). As the work cottages were established at the end of the 1880's Elementary school teachers were at the beginning of their professional projects. The elementary school teachers compared themselves to secondary grammar school teachers whose work situation was considered to be significantly favorable. The children in secondary grammar school were considered to be well-mannered, neat and tidy and interested in schoolwork compared to the poor, often truant, elementary school children whose education was not considered to be an activity of higher status. The establishment of work cottages contributed to the improvement of elementary school teachers' conditions. They saw a possibility to increase their salaries by working extra.

thought", "the social pedagogical thought" (which also contained ideas about the child's recreation) as well as "the educational pedagogical thought" and these areas are connected here to the four time periods which we have demarcated in our investigation of *fritids*.

2.1.1. Work Cottages' Ideal Children and Their Upbringing

The curriculum code⁵ for school can be seen as ethical and the curriculum for junior school and infant school was based on a Christian content, a humble upbringing. Vallberg Roth (2001) calls it "God's curriculum code", a patriarchal code, where God, king and fatherland were praised. Boys and girls sat on different sides of the classroom and were registered in different work cottages, and boys worked with woodworking and girls with textile handicrafts.

The view of children at the time had its roots in the romanticism of the 1800's. The child was naturally goodhearted and pure, but could also have evil and spiteful inclinations that must be restrained. This was particularly considered to be the case of working-class children, who did not enjoy the strict moral upbringing and discipline that would make a child obedient, humble and god-fearing (Banér, 2006).

2.1.2. Work Cottages' Pedagogy: "Idle Hands are the Devil's Playground"

The work cottage's pedagogical concept had a simple basis. It can be seen as a basic behaviorist idea, where children were conditioned towards good practices through encouragement and away from bad practices through punishment. The underlying notion can be summarized with the expression "Idle hands are the devil's playground": those with too little to do will get into mischief.

However, elementary school teachers and junior school teachers established through their work the

⁵ By "curriculum codes" a wider concept is meant, that not only includes written goals and plans but even content within the organisation (cf. English 'curriculum').

practical agenda for the work cottage, and in many cases had another view of the pedagogical importance of practical work. There was amongst those teaching groups a pedagogical interest for the progressive currents that were modern in Europe, USA and later in the newly formed Soviet Union.

The progressive movement developed from the turn of the century until the 1930's, when it subsided (Arfwedsson, 2000). John Dewey in the USA, Celestin Freinet in France and Ovide Decroly in Belgium were amongst its prominent figures. They considered practical experimentation to be an important part of learning, the first step on the path to knowledge (Pihlgren, 2004). The work of the hand and intellect were considered to be connected, one supporting the other. The interaction within a group of children was considered to be an important contribution to the development of the child and the group was used as a means for fostering. Group members would learn to be part of a functioning work fellowship through conflict resolution and decisions made in general meetings.

From a developmental, psychological perspective the idea is based on challenges (and conflicts) that act as development motors. Development occurs when the individual becomes unbalanced by being faced with a problem that requires a solution (Jerlang, 2007). The ideas were influenced for example by Dewey's and Vygotsky's theories⁶ (Pihlgren, 2008), although the latter was dealt with as practical 'method tips' in Swedish teachers' discourse (cf. Kruse, 1914, Olsson, 1926).

The handicraft activities in the work cottages could therefore be seen as supportive of the theoretical learning of school, yes even as a beginning to new

⁶ Cf. e.g. John Dewey (1916) and Lev S. Vygotsky (1930/1978).

insights. Knowledge in practical Mathematics was needed when the students wove baskets – problem solving, multiplication, division and measuring – or in language – reading and understanding instructions. In the course of their work children educated each other about order and diligence by discussing, making decisions about rules to govern their work, about how material and tools should be used and taken care of. In some areas the work cottages were a way to try ideas in a context outside the otherwise regulated school pedagogy.

2.2. Afternoon Centres from the 1930's – The Recreation Idea

During the 1930's the inspection of the work cottages was passed over from the Elementary School Board to the Child Welfare Board (Rohlin, 2001). Children's living conditions had improved. The absence of parents from the home was shorter. The work cottages' original goals were not as apparently urgent. Schools took care of children for longer periods of time, handicrafts, physical education with games and meals were now elements of the school day. The link to employment policy now seemed reprehensible. The state commission wrote:

The primary principal ought to be written off as it is in opposition to our times social attitude, which seeks to protect children against an early exploitation for the purposes of making money. School is and should be the only societal institution, which imposes upon children age-appropriate labor. The time children enjoy in addition to that should indeed be filled with work in the home, but it must however primarily be spent on recreation.

SOU 1938:20, s. 46 (authors' translation).

A new political ideology came to dominate the public spirit and progressive pedagogy disappeared (at least for a while) from the general pedagogical debate. Instead school children's need for free activities and recreation was highlighted; outdoor play, games and free activities (Rohlin, 2001).

The concept of recreation, relaxation and rest seems to have been born from its opposite – the concept of work. Leisure time takes shape now, a "time for leisure", being off from school and "obligation".

2.2.1. The Afternoon Centre's Ideal Children and Their Fostering

At the same time as the family dissolved as a production unit as a result of industrialization, a romanticized view of the family and home grew (Tallberg Broman, 1991). Co-operation with families was highlighted in line with the social democratic politician Alva Myrdal's social pedagogical idea – the afternoon centres ('*eftermiddagshem*') should have distinctive home environments and not consist of large groups of children (Rohlin, 2001). The ideal child was now a clean, well-developed and happily playing child, while its opposite, the dirty and physically and spiritually undernourished (or malformed⁷) child represented the undesirable. There were obvious gender differences. Boys were often described as 'vigorous builders' in the rhetoric of the steering documents, while girls were described as 'soulful little mothers' (Vallberg Roth, 2001). It was presumed that

⁷ During the period 1934-1975 sterilisation of mentally ill and handicapped people occurred in Sweden, something that was advocated amongst others by the Social Democrat political couple Alva and Gunnar Myrdal in the book "Crisis in the Population Question" 1934.

they would work together side by side for the development of the country.

2.2.2. The Pedagogy of the Afternoon Centre: "A Little Sunshine for Mom and Dad "

In connection with the transfer of the work cottages to the Child Welfare Board, kindergarten teachers arose as the occupational group that for the next thirty years (until the mid 1960's) would be active within the Afternoon centres (Rohlin, 2001). They brought another pedagogical tradition that for a long time had been the prevailing one within preschool: Friedrich Fröbel's ideas about the child as a little growing plant in kindergarten. This idea sees the child as having already, within itself what is acquired: development and learning are seen as a process of maturity, as when a plant grows from a seed into a beautiful flower.

From a development psychological perspective it can be said that this idea has its origin in an idea which is diametrically opposed to that of progressive pedagogy – here the child develops when it can grow in harmony with its own developmental processes. The adult's task in this context is to ensure that the environment is as harmonic as possible and that disturbing elements are eliminated (Jerlang 2007). In the good home (or afternoon centre), where the child is clean and well-nourished in a beautiful and good environment, the child also will want what is good. The idea can be illustrated with a verse from a Swedish nursery rhyme *When the Sun Shines into My Cabin* [Du lilla solskän] by Algot Eklöf from 1929: "I wish to be a clear ray, a little sunshine for mom and dad" (Swedish Sunday-school Songbook for Home, School and Church Services, 1929, p. 239).

In this tradition children were encouraged to develop through playing and with pedagogical material that

gave opportunities for motor skills and cognitive training. The child's social training occurred through circle time, where the child practiced sitting still and listening, waiting for its turn and speaking in a group (Haglund, 2004).

The pedagogical reality in the afternoon centres, which were a part of day care centres, was however often quite different. The older children, who spent a great deal of time in school, joined the group when large amounts of the day care's pedagogical activities had already been carried out and the afternoon was often spent on homework (Rohlin in Pihlgren, 2011). The view of children and pedagogy had its basis in a pedagogy for younger children and the content often felt meaningless for older children, who often chose to be 'latchkey children' instead of continuing in afternoon centre activities⁸ (Rohlin, 1996). In this context, one must, have questioned whether the organization was really needed.

2.3. The Early Fritids from the 1960's – the Social Pedagogical Idea

The active kindergarten teachers protested in the beginning of the 1950's and onwards that their education was not adapted for the age-group of the afternoon centres. This eventually led to the first undergraduate studies in recreational pedagogy being started in 1965. At this time the afternoon centres also got a new name: 'fritidshem', *fritids*.

At the same time, political and ideological currents developed from social conservatism and social liberalism into social democracy and socialism, where

⁸ 'Latch-key children' was a designation that arose during the time of the afternoon centre's organisation. The concept term children who did not have their mother at home and therefore had to carry a key on a string around their neck to be able to unlock the door at home after school.

the idea of the Swedish welfare state gave the curricula for younger children a focus in democracy and comprehensive personality development (Vallberg Roth, 2001). Successive social and education reforms came during the 1960's – 1980's. The development of *fritids* was a component of those reforms. Two national inquiries were of key importance: SOU 1974:42 *Children's leisure time* and SOU 1974:53 *Work Environment at School*. The child's situation in school was largely excluded from the inquiry texts and work methods and choice of activities were still related to preschool traditions (Rohlin, 2001). At the same time a new view of school and its nurturing role was developed and came to dominate during the 1980's. It was in other words not just *fritids* that underwent changes, but even the view of school was renounced⁹. In association with the 1969 curriculum, Igr-69 (The Swedish National Agency for Education, 1969), FA, or 'free activities' were introduced in school. With that, work methods that were previously part of *fritids*' and preschool's arenas, were now introduced in school.

In the pedagogical program for *fritids* from 1988 a clear boundary was emphasized between the activity areas of *fritids* and school subjects. The activity areas nature, culture and society should:

not be seen as a subject-focused organization of *fritids* activities. Their sole purpose is to facilitate the description, planning and evaluation of the organization's content.

The Pedagogical Program for Fritidshem (1988:7) p. 31
(authors' translation).

It was emphasized that school is not a *fritids* and *fritids* is not school, something that was also

⁹ An extensive investigation can be found in Rohlin's dissertation (2001). See for ex. Ministry of Education and Research *Skolan skall fostra* [The School Shall Foster] (1979).

emphasized by the active *fritids* pedagogues. The definition of the concept leisure-time had been rejected in the pedagogical program so that homework or studies were kept outside of the *fritids* (The Pedagogical Program for *Fritidshem*, 1988:7). With that a natural link between school and *fritids* disappeared. The organizational relationship between preschool and *fritids* was reinforced during this period. Leisure-time became the time of day that the rule-governed world of school would be kept at a distance. Instead the child would develop independence and responsibility in accordance with the pedagogical program, in a domestic environment with restful relaxation, free creativeness, time outdoors, and domestic chores (Rohlin, 2001). The curriculum codes in school and preschool were of a rational nature during this period (Vallberg, Roth, 2001) but those of the *fritids* seemed to continue to be of a moral nature.

When it comes to society's intentions, large parts of the 1980's were however characterised by an aspiration to integrate the *fritids*' organization with that of school. The so-called *Fritidshem Committee* (SOU 1985:12) was appointed. Its investigation resulted in the concept *school-aged child-care* (child-care for children aged 6-12) and gave a number of suggestions for organization of school together with *fritids*. In 1989 *The Committee for Questions About School-Aged Child-Care* was appointed. The directive formulated by the committee:

...shall thereby follow, stimulate and precipitate a development towards an organizationally and pedagogically assembled organization for school and school-aged child-care

SOU 1991:54, p. 147 (authors' translation).

The education pedagogical idea began to take shape.

2.3.1. *The Early Fritids' Ideal Child*

The 1970's in Sweden involved an explosive expansion of child-care. The economical boom at the time made it possible for the public sector to grow, the need for female labor increased and with that also the need of child-care (Vallberg Roth, 2001). At the same time there was an ambition within the political social policy to achieve gender equality and equality between social groups, amongst other things expressed in the steering documents.

The pedagogical rhetoric had been dominated by philosophers and pedagogues until the 1960's but psychologists took over the rhetoric in curricula during the *fritids* early days and in the prevailing pedagogical paradigm: Piaget, Erikson, Gesell and Kohlberg became often quoted notables. The basis of these pedagogical ideas was that the child by nature was competent and active in its own learning.

At the *fritids*, where the new *fritids* pedagogues clearly disassociated themselves from the regulations of school, the desirable child was an original, natural child if anything, that developed through play and creativity and who worked in fellowship with its companions. The ideal child could be described as a country child, liberated from school:

The younger school child was formed and modeled on the early village solidarity, through suggestions about developing living neighborhoods, workplace visits for children, proximity to adults within the work field, workshops etc. Visionaries created a reality that few recognized.

Malin Rohlin (2001), p. 138 (authors' translation).

2.3.2. *The Early Fritids' Pedagogy: "Thomas Goes to the Doctor"*

The underlying developmental psychological theory had a basic biological idea: the child's development and learning occurs according to a number of predetermined developmental stages, which follow each other and are the same for all normally developed children. The realistic children's books dealing with everyday topics that now turned up in the organization's bookshelves can be seen as a sign of the time's parenting, a combination of scientifically supported maturity within developmental stages, democratic equality and sociopsychological nurturing. In Gunilla Wolde's "Thomas Goes to the Doctor" [*Totte går till doktorn*] (1972) we follow Thomas, a boy who visits the doctor together with his mom and afterwards processes his experience of being vaccinated together with his teddy bear.

At the same time the Swedish school's curriculum Igr-69 (The Swedish National Agency for Education, 1969) stood for a pedagogical idea with totally different characteristics. This pedagogy was based on behaviorism, with Ivan Pavlov and B. F. Skinner as the underlying theorists (Pihlgren, 2006). Here the child was indeed seen as a biological being whose maturity occurred in accordance with the species' genes so long as it was given food, shelter and rest, but the actual learning was seen as a question of environment: with the right environmental stimuli the individual could be conditioned to "proper" or "improper" behavior. In 1980 the curriculum Igr-69 was replaced by a new curriculum, Igr-80 (The Swedish National Agency for Education, 1980), which instead had its basis in Jean Piaget's pedagogical ideas, *genetic epistemology*, by which children go through different cognitive developmental stages. The school thereby came closer to the pre-school's traditional view of learning.

The Day Nursery Inquiry [Barnstugeutredningen] (SOU 1972:26), which came to lead the statutory right to universal pre-school for all children from the age of 6, advocated dialogical pedagogy, where respect for the child as an individual should be taken into consideration (The Swedish National Agency for Education, 2003), a pedagogical idea that was more comparable with those of the progressive pedagogues. The child should seek knowledge itself, choose and test its way forward through interaction with others (Simmons-Christensson, 1997). The progressive ideas, that had previously been found as one aspect of the work cottages' pedagogical basis, had a period of revival in the pedagogical debate and in practice, but were now primarily focused on the individuals' development rather than on that of the group, the co-operative upbringing which had been the focus during the 1900's (Arfwedson, 2000).

Fritids activities were expected to be influenced by pedagogical ideas from the pre-school with a home-inspired play environment, or a "miniature welfare state", as Vallberg Roth (2001) calls it. The children encountered yet another pedagogical focus in school, the behaviorism, a focus that the representatives of the *fritids* strongly reacted to, as seen above. Instead, dialogical pedagogical and progressive pedagogical ideas came to influence the activities of many *fritids* (cf. A Book About the Pedagogy of Work, 1981). It was a third position, compared with both the pre-school's and school's. In the *fritids* a whole new occupational category had emerged – *fritids* pedagogues. They sought a pedagogy more adequate for their age-group than the one presented during the time of the afternoon centre. The new occupational group *fritids* pedagogues created a pedagogical profile for themselves.

2. 4. The Late Fritids' from the 1990's – the Educational Pedagogical Idea

At the turn of the year 1997-98 the Swedish National Agency for Education became the supervisory authority for the *fritids*. This was done with a background of the government statement that in 1996 established

that pre-school, school and school-aged child-care shall be integrated to create unity in the pedagogical organization of children's development and learning

Voices on Swedish Child-care,(Socialstyrelsen, 1997), p. 4 (authors' translation).

A number of inquiries during the 1990's had continued to stress the advantages of the transfer of school-aged child-care to the educational domain (cf. SOU 1992:54, SOU 1994:45). In *Growing in Learning* (SOU 1997:21) investigators wrote that with the aim of reaching an active learning, teaching is about more than conveying information. It is about:

creating conditions for learning through arranging situations and environments where the individual can actively acquire knowledge and where knowledge is later seen more as a process than a product /--/ School is not just to develop the students' intellectual aptitude but also their physical, practical and artistic abilities and with that make room for creation, play and fantasy. The concept of knowledge must be understood from this perspective.

SOU 1997:21, p. 74 (authors' translation).

Critical voices described the change in economical terms. Through transferring state funds from the social sector to the education sector school would receive a more favorable allocation of the "social pot".

Funds were made available by the *fritids* moving into the school's premises.

The integration of school and *fritids* was in the beginning seen as positive by both teachers and *fritids* pedagogues (Andersson m.fl., 1997). The increased co-operation entailed was appreciated. The comprehensive view of the child and the pedagogical goals for the *fritids'* organization in co-operation with school was now reinforced by the fact that the *fritids* received explicit objectives for its organization, a pedagogical program (SOU 1997:21).

In the curriculum LPO 94, which was the mutual curriculum for school, *fritids* and pre-school class at the turn of the year 1998/1999, the concept fundamental values appears for the first time. The nurturing of democracy is a value that is emphasized most of all (The Swedish National Agency for Education, 1994). Beyond that, respect for the intrinsic value of every person and our environment, are emphasized as well.

In the beginning of the 21st century The Swedish National Agency for Education delivered an inspection report *Does the Fritids Exist?* [Finns fritids?] to the Swedish government (2000). The report was extremely critical of the development being carried out in the re-organization: children's groups at *fritids* had become larger, with reduced staff numbers per child, and with *fritids* pedagogues working to a greater extent with school teaching, as substitute-teachers or replacements for teachers, possible economical effects of economic resource allocations (Andersson et al., 1997). At the end of the 1990's Sweden went through a tough economic crisis, something that strongly contributed to the sudden breaking point.

2.4.1. *The Later Fritids' Ideal Child and its Fostering*

The United Nation's 'Convention on the Rights of the Child' (1989) took effect in Sweden September 2, 1990. In it 54 articles stipulate that children have civil, political, economic, social and cultural rights and the right to protection. The philosopher Gareth B. Matthews (1994) saw signs that children were increasingly being regarded as autonomous within the judicial system, as individuals independent of their parents. Children's rights were also reflected in the view of children that permeated Sweden's steering documents at the time. Curriculum patterns showed a sliding from the equality of the 1960's to *freedom of choice* (Lindensjö & Lundgren, 2000). Vallberg Roth (2001) calls it "The situated world's child's curriculum" (p. 258). The child's own perspective was demanded and a greater responsibility was placed on the child to be able to obtain information in interaction with its surroundings. It was no longer a matter of an "equal", natural child, but rather of a child that could make its own choices (Lindensjö, Lundgren, 2000). The child's qualities (its gender as well) were no longer considered to be psychologically established, but were seen as situated, dependent upon context (Vallberg Roth, 2001). The ideal child was considered to have its own life project (Englund in Vallberg Roth, 2001) and was considered to be responsible, reflective, active, critical and investigative (Lofors-Nyblom, 2009).

The antithesis of the ideal child in that way became a child that could not manage critical, independent reflection. The usage of psychological and medical diagnoses with neurologically based explanations for social and learning disabilities ex. ADHD/DAMP increased within school's and the *fritids'* organization (Palmlblad, 2003). The child was considered to be chronically problematic, and was taken out of the group to be dealt with.

An interesting occurrence of the time was the growing attention towards *curling parents*, a concept that described parents, who, like players on a curling sheet, swept the path for their children and cleared away all of the obstacles and dangers in a way that bordered on over protectiveness (cf. Hougaard, 2000). The phenomenon was diligently discussed in the general debate. From a developmental psychological perspective these currents can be said to originate in (somewhat undeveloped) harmony ideas i.e. that children develop if they are not faced with disturbing elements or danger. The trend at times made itself felt in practice at the *fritids*. Activities like those at adventure playgrounds could no longer be undertaken because of safety regulations regarding the structure of playgrounds.

In the wake of the curling parent debate came a focus on parents who could not deal with their children, and children who lacked discipline. On the popular child-rearing program *Supernanny*, a British TV-series from 2004 which was also seen in Sweden, child minder Jo Frost used rewards and punishment in order to get disobedient children in curling families into shape. The naughty corner was re-introduced in the form of *the naughty step* and rewards in the form of *the reward chart* (cf. www.supernanny.com), modernized behaviorism based child-rearing methods. It seems as though the emphasis of the time on individual responsibility and options created an uncertainty in parents (and pedagogues) about doing a proper job of rearing "life project" children.

2.4.2. The Later Fritids' Pedagogy: "Hogwart's School of Wizardry"

During the later part of the *fritids* its organization was more closely connected to school through the curriculum LPO 94, which now covered school, pre-

school and *fritids* (Swedish National Agency for Education, 1994) and through the organizational changes where *fritids* often came to be located together with schools. Network and network-based work methods in different forms were advocated as a way of learning: Teaching methods like for example PBL, (Problem Based Learning), Storyline and subject integrated themes was highlighted in official pedagogical documents, and staffs were encouraged to organize in working teams.

The pedagogical base of the curriculum was a theory built on a social constructivist foundation, where the foundation was shared with the progressive pedagogical ideas, some of which were partially relevant during the time of work cottages and of the early *fritids* (Pihlgren, 2006). From a developmental psychology perspective social constructivism assumes that learning occurs through interaction with others and with the surrounding context and that all challenges (unbalance, conflicts) can act as motors in development (Jerlang, 2007), a dialectical view, which is in direct opposition to the view that characterized "the curling idea".

J. K. Rowling's books, popular amongst children and youths, about Harry Potter and his education at Hogwarts School of Witchery and Wizardry (published 1997-2007), can serve as an example of this pedagogical idea. Harry, who is alone in the world, is educated as a wizard in an unfamiliar world, where there is very little that is similar to the structures and conventions that prevailed in his regular 'Muggle' life (as a normal person). The wizarding world, wizards and witches, yes, even the school's surroundings and teachers can be both irrational, difficult to interpret and dangerous. Harry is forced to make his way through by learning from his experiences, through encounters and networks with others and by facing

challenges. Learning is often begun in the classroom, but is fortified and developed in Harry's leisure-time.

During this time period the professionals seemed to have begun to seek their occupational role by defining what distinguishes the pedagogy of *fritids*. In a document for the Swedish Teacher's Union about the role of *fritids* pedagogues Ingrid Carlgren (2002) wrote that the strengths of *fritids* pedagogues within the framework for the school's work can be found in practical work in different subjects, in creativeness, experiences, ethical discussions, interaction between companions, conflict resolution and time spent outdoors. According to Carlgren there was a tradition of concentrating on the process rather than on the result, an orientation towards informal learning situations, rather than formal. Doctorial dissertations that dealt with different aspects of the role of the *fritids* pedagogue were also submitted (cf. e.g. Ursberg, 1996, Hansen, 1999, Rohlin, 2001, Haglund, 2004).

3. Conclusions

Without the development of the idea of children and childhood the *fritids* would have had no function. When children become children and need to be taken care of, cared for, and nurtured into a productive adult, the *fritids'* predecessors emerge. But we can also discern how an idea about the "free" child grows forth, a child with its own rights, its own competence, and its own desire, even independent of its parents. At the same time there are ideas about undesirable "problem children" during all of the periods. Development progresses from ideas about the diligent and hard-working children of the work cottages, the happy and healthy children of the afternoon centres, the natural village children of the early *fritids*, to a responsible, critically reflective and free child (who even be free in relationships to its parents). The image of the child

thereby becomes contradictory: a "free" child, who needs to be taken care of, cared for and fostered. A survey of the organizations' social function however shows that one must take into consideration why society feels that these children must be taken care of and how that should be achieved, if one wants to understand which values the organization is intended to create.

In the **work cottage** (turn of the century 1900) children who are a social element of danger and who lack discipline should learn to be productive, diligent and obedient through good role models, often with a simplified behaviorism basic principle: children are conditioned towards good habits through encouragement and to avoid poor ones through punishment. However more complex, progressive pedagogical ideas about learning through interaction also can be found there, where children's practical experience and discovery are considered to be the first steps towards learning. The organization is considered to be an extension of the school's mandate. The values that are to be created are both adapted and productive citizens of society and at the same time, calm and order on the streets.

In the **afternoon centre** (1930's) children should instead be protected from exploitation in the name of recreation, even if the practical outcome is often homework (obligation). The organization is based on little children and is not suited for the appropriate age group, which leads to many children/parents not choosing afternoon centres. The afternoon centre is considered to be an extension of the good home, where it is expected that the child will mature in rich and harmonious environments. The values that are to be created are healthy, modern citizens who represent good morals, health and hygiene and who can construct the growth of the future.

During the **early fritids'** period (1960's) children should have free space, leisure-time, where they can escape the discipline of school and can develop into free individuals. The centre's organization is strongly connected to that of pre-school. The need of a pedagogy suited to the appropriate age group and the desire of the new occupational group *fritids* pedagogues to find an occupational identity will however result in experimentation with dialogical pedagogical and new-progressive pedagogical ideas, with a content other than pre-school's practices and explicitly in opposition to the by behaviorism influenced view of teaching in school. The values to be created are free, social and anti-authoritarian individuals who can work together for a good society.

During the **later fritids'** period (from the 1990's) children should feel that the day's activities are unified, concentrated on learning and development. Here school and *fritids* are united in a common curriculum informed by a dialectical concept, where learning takes place through interaction with the surrounding context and where challenges are seen as developing. However, earlier pedagogical ideas survive and there are strong influences from other pedagogical conceptions in the general pedagogical debate. In the late 1990's the organization reaches a breaking point. The positive integration of the *fritids* with school activities changes due to economical recession. The time spent in *fritids* becomes a change-over time, comparable to recess when the child either waits for school to start or to be able to go home. The values to be created are educated and productive members of society but also effective resource utilisation through shared premises and staff and enabling parental employment.

3.1. The *Fritids'* Ideal Sensitive Fundamental Values

The creation of the *fritids*¹⁰ and its pedagogical identity has been dependent upon steering systems and the view of which problems the *fritids'* organization was intended to take care of, and these have changed with time.

The pedagogy in the *fritids* has been characterized by ideas about creating good habits in children (a moral fostering task), in helping parents with supervision (a social task) and in developing the child (a pedagogical task). The *fritids'* pedagogical basis developed, strongly dependent on pre-school at times, at times on school, during a period when these institutions' pedagogical bases were often conflicting. The often abrupt shifts between different pedagogical bases has been accentuated by the fact that different professions have tried to use the *fritids* arena to strengthen their own occupational roles and thereby steered practices towards their own prevailing tradition.

The *fritids* has existed in the breaking point between these often conflicting mandates and currents, and the outcome of the organization has thereby varied with different performers. The *fritids'* mandate had changed substantially during a relatively short time period in comparison with the view of school and teachers, whose teaching mandate regardless of pedagogical focus and intentions of society in many respects is considered to be obvious¹¹. That an effect was also made on school by certain pedagogical currents from

10 In this section the current term for *fritids* is used to denote work cottage, afternoon centre, as well as *fritids*, if nothing else is mentioned in the text.

11 Even if the Elementary school reform can not be said to have come into practice properly until the 1880's, simpler forms of schooling had occurred much earlier (read, write, count), for example under the direction of parish assemblies.

the *fritids* (e.g. through FA) hardly made the *fritids* specific pedagogical mandate itself more clear. The contradictory and abrupt changes to the *fritids* during its development can in itself explain the current negative assessments of the Swedish National Agency for Education/the Swedish Schools Inspectorate that were articulated in the introduction and which gave birth to our examination in a historical light. In searching for a distinct professional identity, the group of *fritids* pedagogues had begun to discern the contours of a pedagogy for children in the *fritids*. But, when explicit official goals were formulated in writing, the economic crisis occurred and the organization lost its goal focus.

As is evident from this review the child and its ascribed characteristics are social constructions that have shifted over time. The child is ascribed positive characteristics that are desired in the adult citizen. Alternatively, the child is ascribed the negative qualities that are seen as a threat to society's growth. The construction the 'problem child' seems to arise as an explanation to why certain children do not behave in accordance with their 'inherent' nature: for example they have ADHD, they are 'badly brought up'. Because the *fritids* is seen as supporting child development through informal learning, it becomes more sensitive to and dependent on the prevailing construction of children and must adjust itself to the view of the ideal child and the problem child to a greater extent than does the school, whose product could be perceived as the attainment of knowledge through formal learning. The fundamental values of the *fritids* shift tack with new ideal images of what should be considered a good (future) citizen of society. Since such images and values are at the core of the *fritids'* organization and practice, it thus becomes strongly sensitive for "booms and recessions".

The image of a "free", investigative, and responsible child affects the steering of the *fritids'* activities, while at the same time the need to take care of, care for, and foster the child becomes greater. Paradoxically the *fritids* (free-time home) has come to mean a greater lack of actual freedom for the child, both spatially and mentally, with the child's life becoming consequently less free with the growth of the idea of a "free" child. The organization is left to struggle with a mandate based on fundamental values that are in opposition to its own provision and organization.

Through the different periods there are two discernible ways of looking at the relationship between *fritids* and school. Either the school and *fritids* are seen as a whole in the child's learning and development (cf. work cottages and the *fritids* since around 1990's) or the school and the *fritids* are seen as each other's opposites, a matter of work and obligation versus leisure-time and freedom from school (cf. afternoon centres and the early *fritids*). In the first view (school and *fritids* as a whole) the common task of school and the *fritids* is to support the child's learning in both formal and informal situations and environments. In this case the *fritids* has a pedagogical strength, since it extends learning time and can give children opportunities to learn, based on their own backgrounds and conditions. In the other approach (school and *fritids* as opposites) the task of *fritids* is more unclear. In a situation where children are no longer in need of care they could just as well spend their leisure-time playing with other children in the schoolyard without the involvement of adults. Leisure-time is time that is managed by the child themselves, otherwise it can hardly be considered as leisure. If this time is not managed by the children the organization risks being steered by other values than those intended by the curriculum, in fact there is a

paradoxical hidden curriculum "in the name of the child's leisure-time".

4. Discussion: *Fritids*' Challenges and Possibilities

During 2010 the Swedish government presented new steering documents. In the Education Act the organization of *fritids* is expressed as being education: "Every municipality shall offer education in *fritidshem*" (SFS 2010:800, 14 ch. § 3). The children at *fritids* are referred to as "students" and in the inquiry text (U2009/7188/S, p. 481-490) it is emphasized that *fritids* are an important complement to school where "leisure-time pedagogical activities" should be "integrated with teaching during scheduled time" (ibid. p. 481). The care in *fritids* should include a clear pedagogical, curriculum-bound content, where an investigative, laboratory and practical methodology should contribute to fulfilling the learning outcomes of school. At the same time the professional education for *fritids* pedagogues became a 'teacher' education (Prop. 2009/10:89). A new view of the role of *fritids* in child development and learning was consequently presented. The work cottage's connection to school, which returned for *fritids* in the late 1980's was strengthened, with the goal of a comprehensive view of school and *fritids*.

Afternoon activities, like those of *fritids*, connected to the teaching of school but with an experiential or 'laboratory' method, based on the children's own interests, could perhaps offer part of a solution to the deteriorating position of Swedish schools in international comparisons. In order for such an objective to be fulfilled some of the stakeholders for this work, teachers and *fritids* pedagogues and their unions, leaders, and the government, must come to terms with a number of the events we have illuminated with the light of history. To the *fritids*

pedagogues this analysis might help to make some sense of the double bind in which they might find themselves. To other stakeholders it might point to constructions which should be taken account of in furthering their aims. An increasingly changing and complex world will make demands on professionals to scrutinize and discuss their view of children and of learning in order to reach a common pedagogical foundation. At the moment such a development is still covered in the darkness of the future...

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CHAPTER 17

EXERCISING AN ETHIC OF CARE: MISSISSIPPI SCHOOL LEADERS' RESPONSES TO HURRICANE KATRINA

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Abstract

Five years after the eye of Hurricane Katrina moved over the Mississippi Gulf Coast, school superintendents there continue to work at recovery of their school districts from the devastation of the hurricane. Such issues as FEMA negotiations, unpredictable school enrollments, skyrocketing insurance premiums, falling revenues, the "Great Recession," and the effects of the Gulf oil spill have complicated the recovery efforts. In spite of these issues, some of the superintendents have continued to ground their work in a commitment to the people and communities they serve. In an era of accountability for raising student achievement, these school leaders have devoted their efforts instead to helping children, teachers and other school personnel, and their communities recreate their lives and livelihoods. The superintendents modeled and taught

the value of caring, both in their words and in their work, and that value was evident in the actions of the stakeholders—students, teachers, and other school personnel--that we observed throughout their school districts. This narrative study of the superintendents' perspectives on the ongoing recovery work in their school districts analyzes their words and work through the roles of "symbolic leadership" posited by Deal and Peterson (2000) and Noddings' (2005) imperative to care in schools.

Keywords

Leadership – symbolic - caring

1. Introduction

On August 29, 2005, Hurricane Katrina made landfall along the Mississippi Gulf Coast. Katrina was a huge storm, with sustained winds at landfall of about 127 miles per hour. From Bay Saint Louis and Waveland on the west to Pascagoula on the east, the hurricane caused massive destruction. In Bay Saint Louis and Waveland, where the eye of the storm hit, the storm surge was estimated to be nearly 30 feet deep, and it went inland for several miles before receding. A report from the National Hurricane Center noted, "The storm surge of Katrina struck the Mississippi coastline with such ferocity that entire coastal communities were obliterated, some left with little more than the foundations upon which homes, businesses, government facilities, and other historical buildings once stood" (Knabb, Rhome & Brown 2006: 12). The devastation to the Mississippi coastal communities was unimaginable.

Homes, businesses, government facilities, historical buildings, and schools were destroyed or severely damaged. Restoring, rebuilding, and recovering from Hurricane Katrina became the first order of business for the school superintendents along the coast. In the fifth school year (2009-2010) after Hurricane Katrina,

the superintendents and their school districts continued to deal with the effects and aftereffects of the hurricane.

Between 2006 and 2010 we interviewed several of those superintendents as they worked to put their school districts back together. The purpose of our studies has been to describe and explain how Hurricane Katrina and its aftereffects have affected the leadership of those superintendents. In this reanalysis of the data generated by the earlier interviews and analysis of interviews conducted in 2010, we consider the data relative to two research questions: 1. Which frames of symbolic leadership (Deal & Peterson 2000) exemplify their practice? and 2. How have the superintendents' leadership aligned with Noddings' "challenge to care in schools" (2005)?

According to Hirsch, formerly high school principal in one of the school districts affected by Hurricane Katrina and now the superintendent there:

The greatest challenge imposed upon educators post-Katrina was to create and build some sense of continuity and normalcy for children of school age. This challenge was compounded by the fact that many members of the education community . . . were themselves displaced and had experienced either the total loss of . . . or severe damage to their homes. The ensuing process of recovery and rebuilding while living under extremely difficult conditions and continuing to report to a tumultuous and uncertain workplace translated into great personal and professional hardship to say the least. (Hirsch 2008: 2)

Adding to this hardship was the decision of Margaret Spellings, then US Secretary of Education, and Mississippi state leaders that the school districts affected by the hurricane were to be held to the same standards of accountability for student achievement as

school districts that had not been affected by the Hurricane.

2. Review of Literature

Deal and Peterson argue that "culture arises in response to persisting conditions, novel changes, challenging losses, and enduring ambiguous or paradoxical puzzles" (2000: 202). The superintendents in Mississippi experienced changes that could be considered "novel." All of them had experienced hurricanes, but none of the magnitude of Katrina. The losses they have faced present challenges to their leadership and the culture of their schools and communities, and there are no pat answers to the "ambiguous" puzzles that they deal with on a daily basis.

According to Deal and Peterson, more important than leadership practice in terms of the culture of a school district is symbolic leadership; they identify eight major symbolic roles that are critical to school culture. The roles include historian, anthropological sleuth, visionary, symbol, potter, poet, actor, and healer (2000).

Schlechty summarizes the symbolic leadership of superintendents as "moral authority." He asserts, "Who the superintendent is, what the superintendent values, and the style of operation supported by the superintendent will be manifest throughout the school system" (2000: 183). In a time of crisis, the superintendent's moral authority not only leads the school system but also serves the larger community.

DePree links the moral and spiritual dimensions of leadership as "the need always to connect one's voice and one's touch" (1992: 3). The actions of a moral and spiritual leader are consistent with the beliefs and values he or she communicates. "Beliefs and values

are the footings on which we build answers to the questions 'Who matters?' and 'What matters?'" (36).

The role, then, that superintendents play is critical, at face value, and symbolically, in a school district. How the leaders themselves understand and reflect on their role in the culture of the school district and the community is key to predicting their success in leading their schools and school districts in dealing with change, whether that change is planned or whether it is the result of something outside the control of the school system.

Marshall, Patterson, Rogers, and Steele define caring as "a situation- and person-specific way of performing in the world that requires being fully and sensitively attuned to the needs of the cared for by the person caring" (1996: 278). Noddings asserts "that caring is the very bedrock of all successful education" and that caring should be one of the most important aspects of schooling in general, and in leadership, in particular (2005: 27).

Caring leaders, according to Noddings, believe that "the living other is more important than any theory" (Noddings 2005: xix), and they "hear their students' [and teachers'] expressed needs, whether those needs are expressed verbally or in some other way" (2006: 341). Caring leaders determine from a moral perspective how those needs should be addressed.

Glanz agrees that caring is critical to schooling and, according to him, caring begins with the organization's leaders. "Nurturing an 'ethic of caring,' [leaders] realize their ultimate motive is to inspire a sense of caring, sensitivity, appreciation, and respect for the human dignity of all people despite the travails that pervade our society and world" (2010: 74). For Glanz, the very foundation of the organization of education should be caring. Caring leaders do not just "inspire"

caring, according to Noddings; they actively teach caring through modeling (2005). In other words, school leaders who exercise an ethic of care are both symbols of caring and active teachers of caring to the teachers, students, and communities they serve.

3. Methodology

Sergiovanni (2000) says that effective leaders are involved in “the stuff of culture, the essence of values and beliefs, the expression of needs, purposes, and desires of people, and about the sources of deep satisfaction in the form of meaning and significance . . . [in other words,] the ‘lifeworld’ of schools and of parents, teachers, and students” (5). It is important to understand how the Mississippi Gulf Coast superintendents define their leadership and understand their roles in the “lifeworlds” created by Hurricane Katrina.

According to Chase, “Narrative is retrospective meaning making” that presents the narrators’ (the school superintendents’) point of view, their emotions, their thoughts, and their interpretations (2005: 656). Narrative inquiry provided the opportunity to hear the personal “story” of each of the superintendents, how each of them understood the “lifeworld” of the schools in their respective communities, and their leadership practices before and after Hurricane Katrina.

We conducted interviews with Mississippi Gulf Coast school superintendents from 2006 through 2010. During the interviews, we asked for specific information from the superintendents about recovery. But we understand that the real meaning-making of the superintendents was in the stories that they chose to tell about their experiences, and we sought to establish our interviewees as narrators and ourselves

as listeners, encouraging them to tell the stories that were important to them. This narrator-listener relationship is what distinguishes narrative inquiry from other forms of qualitative research. It is "the stories people tell [that] *constitute* the empirical material that interviewers need if they are to understand how people create meanings out of events in their lives. . . ." Indeed, we acknowledge that the superintendents were "narrators with stories to tell and voices of their own" (Chase 2005: 660).

The interview data were analyzed through both "connecting" and microanalysis that were recursive and concurrent with the interviews. Maxwell describes the connecting process as a process that seeks to "understand the data . . . in context . . . to identify the relationships among the different elements of the text" (2005: 98). Microanalysis, on the other hand, is a process of examining the data line by line, looking for themes and meaning that recur in the data from each participant and among the participants (Strauss & Corbin 1998).

4. The Superintendents' Stories

4.1. Symbolic Leadership

The aftermath of Hurricane Katrina changed the face of the Mississippi Gulf Coast, and it changed the "lifeworlds" of the superintendents we interviewed in ways they could not have begun to imagine before the storm. The superintendents exemplified the symbolic roles posited by Deal and Peterson (2000). Here we present some of the stories that exemplify four of those roles--visionary, poet, actor, and healer.

The visionary "works with other leaders and the community to define a deeply value-focused picture of the future for the school; has a constantly evolving vision" (Bolman & Deal 2000: 204). Hurricane Katrina

provided a context for the superintendents to play the role of visionary in their work with Civil Defense, the Red Cross, and leaders of their communities.

One of the superintendents was the unofficial leader of the superintendents across the Mississippi Gulf Coast; other superintendents acknowledged his leadership. Even before Hurricane Katrina made landfall, he had begun to plan with the other superintendents (as well as the administrators in his own school district), the Civil Defense, and the Red Cross. According to him, a hurricane gives "a new meaning for leadership, for community, for schools."

As time starts to click down, we get called into meetings with . . . Civil Defense. I am heavily involved with shelters and shelter operations for [the county]. . . . They [Civil Defense] decide, along with my help since I have been involved so long, which shelters are going to be open. As the storm comes closer, we adjust that. In this case, we knew it was a Category 5. So we had to open all shelters we could. The more severe the more you open. The [Red Cross] wanted me to open one shelter at a time. I opened 15 [all at once]. . . . You judge the number of shelters based on the size of the storm.

I called the [other] superintendents I tried to spread out the word. . . . Communications is a problem. . . . Regular phones, then cells go. . . . This time I . . . rented four radios for four superintendents so that we had communication.

As this superintendent worked to coordinate recovery efforts, he also was looking ahead to improving them for the next storm.

We should all be on the same system. We should all be able to call everyone. . . . Before we buy satellite phones [to prepare for the next big

storm], we are going to make sure that we and Civil Defense are all . . . on the same system.

After Hurricane Katrina, this superintendent not only organized shelters and clean-up efforts in his own school district. He also coordinated communication and support among all the superintendents. The coastal school districts and superintendents work closely together. One of them said, "We have great respect for one another along the coast. We didn't try to pull from each other, but tried to support each other. We didn't wait for outsiders to help." The superintendents, as visionaries, looked beyond the devastation to the future of their school districts.

The poet "shapes and is shaped by the school's heroes, rituals, traditions, ceremonies, symbols" (Bolman & Deal 2000: 204). After a natural disaster, a school district's priorities shift from its usual rituals, traditions, ceremonies, and symbols. Recovery efforts become the order of business. For students, however, it is often the rituals, traditions, ceremonies, and symbols that provide a feeling of safety and comfort.

One school superintendent described the importance of school rituals to recovery after Katrina. When her district's schools reopened, the school entrances were lined with balloons and posters, and after being closed for a month, teachers and administrators welcomed students back to school with celebrations.

The students' lives had been turned upside down by the hurricane; many were homeless, and some were even living on a cruise ship anchored in Mobile Bay. The superintendent believed that it was critical to restore a sense of normalcy at school. For high school students especially, this meant extra-curricular activities, and seniors wondered if they would have a prom. A school in California contacted the district about donating prom gowns, and the superintendent

was delighted. When the prom gowns arrived, according to the superintendent, "it was like something out of a movie." The California school students had donated more than 200 prom gowns, and students in the Mississippi school district were able to plan for and hold the prom. This superintendent, like the others along the Mississippi Gulf Coast, used the symbols of balloons and a prom to communicate to the students and the larger community a sense of normalcy and hope that all would be well with the schools.

The school leader as actor "improvises in the school's inevitable dramas, comedies, and tragedies" (Bolman & Deal 2000: 204). Hurricane Katrina offered many opportunities for the superintendents to improvise. Among the dramas each of the superintendents played out was negotiating with FEMA (Federal Emergency Management Agency). FEMA was responsible for assessing the damage in each school district and determining how the government would support recovery and restoration of school district facilities and equipment.

We observed one superintendent meeting with a FEMA team sent to evaluate the damage to the school district. The superintendent went to the meeting expecting to receive FEMA's final evaluation; instead, the team announced that they were there to review the findings of two previous FEMA teams. It became clear during the meeting that the FEMA team had inaccurate information. At one point, the head of the team referred to the basement walls of the schools; none of the schools in the district had basements. After the meeting, the superintendent expressed her frustration with the process:

This is the third FEMA crew. The school district people from Florida [who had offered their

experience with recovery from a previous hurricane] told us that this would happen. He [the head of the FEMA team] just changed everything we had agreed on. If it was just us, I would think we had done something wrong. But it is all school districts.

As this superintendent dealt with the drama, she kept the children in her school district in the forefront. When FEMA decided that a building filled with mold could be rehabbed, she said that she could not allow "her babies" to go back into that building.

The drama of FEMA interactions continued for more than two years before there was a settlement and the school full of mold in her district could be razed. In 2010, five years after Hurricane Katrina, another superintendent was still negotiating with FEMA about replacing a road that served as the entrance to one of the schools.

The superintendents all improvised in the symbolic role as actor. One superintendent summed up his experience: "My patience level increased, and my confidence went up ten-fold. If we got through this, we can get through anything!"

The leader as healer "deal[s] directly and openly with critical, difficult, challenging events in the lives of staff and students" (Deal & Peterson, 2000: 213). Healing for staff, students, and community became the priority of the superintendents.

At a meeting on October 23, 2005, of about 40 administrators and clerical personnel in the school district with the most destruction, the superintendent asked how many of them were living in their own homes. Only three or four responded; others were living in cars, with relatives away from the coast, or in trailers provided by FEMA.

At the meeting, the superintendent explained procedures for reopening schools on November 7, including enrolling homeless students, identifying students who would need counseling, and providing the services children would need. She recited a litany of materials and services that would not yet be available or in place. Then she put all of the hurricane damage in perspective when she reported on one district staff member who was in the final stages of cancer. After a moment of silence, she said, "We've lost a lot, but we're alive, and we're well, and we'll be OK. We will survive."

This superintendent, like the all the others we interviewed, focused her work on the healing of the school district, schools, staff, students, and families. In all of these symbolic roles, the superintendents put the needs of the people in their school districts first. They modeled caring.

4.2 Caring Leadership

Noddings says that caring is responding to the expressed needs of others. In the aftermath of Katrina, the superintendents all worked to identify the needs of their constituents. They recognized high levels of post traumatic stress disorder among their students and staffs and ensured that counseling was available. They opened "clothes closets" and "food pantries." They relaxed district policies such as dress codes and homework. They provided additional personal leave time for staff members dealing with insurance and reconstruction.

One of the superintendents described responding to a specific need of families living in FEMA trailers:

[He] recounted a teacher's request for him to speak to parents about their children doing their homework. The teacher had asked [the superintendent] to talk with the parents because they were acquaintances of his. . . . He went to visit the family who were living in one of 10,000 FEMA trailers in the school district. The mother told [the superintendent] that living in the 30-foot trailer provided no quiet and no privacy. To survive living in such close quarters, she said, the children were not allowed inside unless it was bedtime or pouring down rain. [The superintendent] said that the homework policy had been relaxed as a result of his interaction with this mother. "There're some things that are beyond our control." For him, understanding the life circumstances of the families in his school district and shaping policies that were responsive to those circumstances was critical to helping the families cope with the aftermath of Katrina. (Gouwens & Lander 2009: 11)

Five years after Katrina, some of the superintendents still attribute their changed perspectives to the aftermath of the hurricane. One superintendent said, "I'm a lot more patient than I used to be." In 2010, his school district was in the midst of layoffs and reassignments because of budget cuts necessitated by an enrollment 40% lower than pre-Katrina and state education budget cuts. Even this process demonstrated his focus on the needs of his staff members. He explained, "We did the non-renewals earlier than a lot of other schools so that people could plan their lives." He based decisions about transfers on the needs of the teachers being transferred and the educational needs of children. In one case, he noted, his deliberation about a teacher transfer included considering the comfort of the teacher with the other teachers at her grade level and the teacher's school-aged children who would probably transfer to the new school with their mother. Although some of his

decisions were not politically popular, he said, "Great political decisions don't make good educational [or people] decisions."

All of the superintendents' descriptions of their work exemplified Noddings' caring leadership. Their focus on identifying and meeting the needs of the people they served demonstrates their commitment to caring about and caring for that Noddings describes.

As the superintendents cared, they were both symbols of caring and the active teachers of caring that Noddings (2005) described. While we did not set out to observe the actions of teachers, other school personnel, and children in the school districts, the feeling of caring was palpable everywhere we went in the school districts. Obviously, the superintendents had fulfilled their roles as teachers of caring. We saw evidence of and heard anecdotes of caring in the schools. At one school, for example, we witnessed a celebration among the teachers because one of them had moved back into her rehabbed house two years after the storm. We heard from teachers that children were kinder to one another, and that overall, there were far fewer discipline issues than there had been before Katrina. We saw "clothes closets" in schools and teachers helping children to select clothing that they needed, and we heard about school level initiatives to help families with their immediate and on-going needs after the storm.

Several interviewees told us that Hurricane Katrina was the great equalizer—nearly everyone, regardless of socio-economic status, had suffered considerable losses in the storm. It seemed also that the storm was the great equalizer in terms of the value of caring—children, teachers, and other school personnel were all reported to share that value, as they all worked to recover from it.

Conclusion

The Mississippi superintendents' "lifeworlds" changed as a result of Hurricane Katrina, and their work took on dimensions and responsibilities they could not have imagined. Each of the superintendents described the changes as challenges that allowed them to grow and to see their work from new perspectives. The new tasks were opportunities for symbolic leadership, at a time when what their work represented in their communities was probably as important as the work itself. Their stories showed the importance of the roles of visionary, seeing beyond the hurricane recovery; poet, maintaining the rituals, traditions, and ceremonies to provide normalcy during what was a very chaotic time; actor, improvising effectively in the new situations that arose; and healer, dealing directly with the destruction of Katrina.

The superintendents also demonstrated caring for and about the people in their schools and communities. They listened for the expressed needs of the people, and they sought opportunities to understand the needs when they were not expressed directly. The superintendents responded to the needs, setting aside district policy at times when the response demanded it. Throughout the interviews, from 2006 to 2010, superintendents noted that in making caring about and for people the focus of their work, they were rearranging their priorities, and that the benefit of Katrina (if there was one) was that renewed focus on the people they served.

The superintendents that we interviewed not only exercised the ethic of caring that that focus represented. They also communicated it, modeled it, and actively taught it. If the measure of teaching is learning, it seemed clear that they had taught it well, since we observed teachers, other school personnel, and children also exercising that ethic of care.

One of the superintendents who retired from a Katrina-affected school district a few years after the hurricane, noted that the people in her school district were used to "taking care of our own." In describing her school district's recovery from the hurricane, she noted that people had come away stronger and more resilient, and that their work together had reminded them of the importance of people. In the end, she said, "It is the relationships with people that you take away."

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CHAPTER 18

SERVICE LEARNING IN A CROATIAN UNIVERSITY: A POSSIBILITY FOR EFFECTIVE PARTNERSHIP WITH COMMUNITY STAKEHOLDERS

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Abstract

The goal of the paper is to discuss and compare the values, attitudes and purposes of service learning stakeholders in Croatia. Service learning (SL), as a pedagogy and teaching strategy that connects meaningful community service with academic learning and civic responsibility, has five major stakeholders: students, faculty, the university, the community partner, and the local community. SL was introduced into Information Science curriculum at the Faculty of Humanities and Social Sciences in Zagreb for the first time in 2006-07, with the goal to transform the old teaching style and offer new roles to stakeholders in higher education.

This study examined SL value from multiple stakeholder perspectives, emphasising the quality of 40 SL projects

using Youth Service California's Service Learning Quadrant (2000). The results showed that SL can become a useful academic tool in transforming our Department and Faculty into a place that meets the needs of different stakeholders and supports the partnership development.

Keywords

Service learning stakeholders – Educational change –
Citizenship – ICT (Information and Communications
Technology)

Introduction

In this paper we present service learning (SL) stakeholders in Croatia, explaining their values, attitudes and issues. The purpose of this paper is threefold. The introductory part gives an overview of service learning in Croatia and explains the roles of major stakeholders in higher education in Croatia. The second part describes the service learning projects and presents project evaluation regarding the value service learning adds to two most important stakeholders – students and the community partner. Finally, the third part of the paper discusses the values that integration of service learning in the curriculum adds for all stakeholders as well as the issues related to each of the stakeholder.

Service learning (SL) was introduced in the final year of graduate study in the Department of Information Sciences at Faculty of Humanities and Social Sciences, the largest faculty of the University of Zagreb (Croatia), in 2006-07 through a series of faculty workshops and academic courses.

Up to that point, Information Science students learned the theoretical concepts and applied them to imaginary or simulated circumstances, but rarely managed to apply the acquired knowledge in the real world. The service learning projects provided them

with structured time to rethink and implement ideas that they had during their 5-year study, but never had an opportunity to transform them into “hands-on” experiences and observe the results.

After the successful project outcomes in the test phase, service learning was introduced in the final year of undergraduate study as well, as a part of a new academic program in the Academic Year 2007-08.

Service learning (SL) pedagogy identifies the following major stakeholders in its activities and goals — students, faculty, the higher education institution (university), the community partner and the local community. A goal of SL is that each stakeholder benefits, learns from, and teaches the other during the service learning project.

Students are engaged in value exchange with community partners, while making real benefits for the partners. Their projects represent the actual implementation of their work, as well as a challenge that tests their theoretical learning. Students of Information Sciences were surveyed at the end of each academic year and the results showed that such placement in real (vs. theoretical) learning situations was very important in increasing the confidence and self-esteem they felt they needed once they entered the labour market. These projects served them as an excellent reference and indication of their creativity and ability to engage intellectually, emotionally and socially.

Faculty and students have the opportunity to engage with problems that community partners in the local community perceive as important, the chance to build new relationships, increase knowledge and develop relevant skills. Moreover, the community partner and the local community at large have the opportunity of direct or indirect economic benefit.

1. Service Learning Projects in the Department of Information Sciences: Implementation and Evaluation

In the first two years, about 40 SL projects in the field of Information Technology were completed and evaluated. Since Information Science covers a wide range of topics and due to the fact that information literacy is an important social issue, while the social need for a visual identity (especially in the electronic environment) is constantly growing, Information Science students truly have a great field for activity where they can meet different interests and apply specific knowledge and skills.

Therefore, the project themes varied, yet all the projects were aimed at linking the goals of Information Science studies with IT problems to meet specific community needs. Here we briefly describe 4 student SL projects that were most valuable for both students and the community partner.

Project1. Starting with the school year of 2009-2010, all pupils who complete the final (4th) grade of grammar school in Croatia take the state graduation exam (based on the Act on Primary and Secondary Education¹). The state graduation exam has two parts: mandatory exams in general education subjects such as the Croatian language and elective exams in one or more optional subjects, such as Information Technology. Our Information Science students came up with the following project idea - an online demonstration designed as a preparatory step for the state graduation exam covering the complete information and computer science curriculum of the state grammar schools. The students' partner was the National Centre for External Evaluation of Education that creates paper exams for all subjects in the state graduation exam and delivers exam materials to

¹ Official Gazette, 87/08

schools. Our students aimed to gain for their own benefit, connecting the theory learned during the study with new practical experiences while at the same time helping the pupils to achieve at a high level in the state graduation exam. State Graduation Online Demo Exam in Informatics consists of 50 multiple-choice questions. It was tested and evaluated by the third grade pupils of Velika Gorica grammar school who will take the state graduation exam at the end of the school year 2011-2012. The overall rating of the exam was high. Regarding the service learning component, this project contributed to pupils' readiness for the state graduation exam in elective subject, Information Technology, and gave them insight into new technologies and new ways of knowledge acquiring as well as its evaluation (such as e-learning and online exams).

Project2. Another group of Information Science students designed a multimedia project for the NGO "Friends of Animals". Although a leader in their field in Croatia, the NGO was at the very beginning of IT usage when we first established contact and offered help. They had computers and a website, but did not possess the knowledge to use IT as a driver for reaching their goals. Therefore, they were excited about the students' SL project, which aimed to inform the citizens about the vegetarian products available in our stores, encourage them to a healthier lifestyle using vegetarian recipes and to learning about healthy food in an interesting way (via an interactive database and multimedia applications on a CD-ROM). The NGO was happy to promote their products by distributing this CD application in the community for free at an event organized during World Vegetarian Day. One of our students received a job offer from the NGO for the position of information technology manager.

Project3. Museology graduate students found that their colleagues and friends visited museums in Zagreb rarely, and also that it is difficult to find funding for promotion of museums at the University in the form of posters and brochures. Therefore, they designed an e-brochure with appealing design, freely accessible on the website of the Faculty for all students who want to discover the world of museums in Zagreb. Their partners were the following institutions: Archaeological Museum, Croatian History Museum, Croatian Natural History Museum, Croatian School Museum, Ethnographic Museum, Museum of Arts and Crafts, Technical Museum and Zagreb City Museum. The number of e-brochure monthly visits is growing, especially in the beginning of the academic year, when freshmen explore the faculty website.

Project4. Another project group consisted of Museology graduate students and Information Technology students with teacher orientation, who designed a workbook for children to complete during a visit to Zagreb City Museum and art workshops to help them acquire knowledge in a museum. Their client was Zagreb City Museum, where they tested and evaluated the workbook with a group of elementary school pupils. Both the pupils and the museum staff rated the workbook as an interesting and useful tool for children, which they can keep as a souvenir from their visit to the museum.

Tables 1, 2, 3 and 4 outline these 4 and other 36 Service Learning (SL) projects.

Project theme	Theme abbreviation	Partner	Short project description
Visual identity of social community	<ol style="list-style-type: none"> 1. VIDS I 2. VIDS II 3. VIDS III 4. VIDS IV 5. VIDS V 	<ol style="list-style-type: none"> 1. Association of extreme sports, Slavonski Brod 2. Zagreb City Museum 3. Alternative-cultural center "Yuma" – for youths in Imotski 4. Association of Martial Arts Krav-Maga 5. Thai Boxing Club "Mustang" 	<ol style="list-style-type: none"> 1. Production of video material and promotional CDs as part of the <i>sports against drugs</i> initiative 2. Brochure design - a guide through museums in Zagreb 3. Graphic solution for the museum exhibition "Light of the gods" 4. Design of flyers, posters and other promotional materials 5. Design of flyers, business cards, logo and website
Multimedia educational software	<ol style="list-style-type: none"> 1. MEDS I 2. MEDS II 3. MEDS III 4. MEDS IV 5. MEDS V 	<ol style="list-style-type: none"> 1. Association of the Blind and Visually Impaired Students "Šišmiš" 2. High School "Velika Gorica" 3. Elementary School "Braća Ribar" in Sisak 4. Zagreb City Museum 5. Flight Centre CROATIA - Parachute Section 	<ol style="list-style-type: none"> 1. "Internet for the blind": design of audio guides for navigation and usage of the Internet for blind and visually impaired students 2. Development of educational software and computer sample exam for the state graduation exam 3. Educational quiz (Fun and Games) for computer assisted teaching in junior school 4. Workbook for children to complete during a visit to a museum and art workshops 5. Designing videos, posters, multimedia presentations, and performance-media promotional activities

Table 1: SL projects at the Department of Information Sciences (1/4)

Project theme	Theme abbreviation	Partner	Short project description
Educational workshops for the broader population	<ol style="list-style-type: none"> 1. EDR I 2. EDR II 3. EDR III 	<ol style="list-style-type: none"> 1. Zagreb City Library - Children's Section 2. Fourth High School, Zagreb 3. Typhological museum 	<ol style="list-style-type: none"> 4. English Language Workshop for Children 5. Web workshops and cryptography workshops 6. Workshops for children to learn about everyday life of blind and visually impaired people

Cultures of Education Policy: Community Involvement and Education Policy

Interactive database with multimedia content	1. IBP I 2. IBP II 3. IBP III	7. The association "Friends of animals": ZegeVege project 8. Elementary School "Vukovina" in Velika Gorica 9. Scouts team "Bota"	1. Developing vegetarian database and a CD with multimedia content 2. Developing a database for students with disabilities and training teaching staff in the database usage 3. Developing a database of scout activities to help the members plan their activities
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Table 2: SL projects at the Department of Information Sciences (2/4)

Project theme	Theme abbreviation	Partner	Short project description
School website	1. WZS I 2. WZS II 3. WZS III 4. WZS IV 5. WZS V	1. Elementary School "Zdenko Turković", Kutjevo 2. Elementary School "Ljudevit Modec", Križevci 3. Elementary School "Josip Juraj Strossmayer", Đurđenovac 4. Elementary School "Žuti Brijeg", Zagreb Elementary School "Petar Zrinski", Jalžabet	Web design and staff training in site updating
Faculty website	1. WZF I 2. WZF II	1. Section for Sinology, Department of Indology and Far-Eastern Studies, Faculty of Humanities and Social Sciences in Zagreb Department of Hungarian, Turkish and Jewish language and literature, Faculty of Humanities and Social Sciences in Zagreb	Web design and faculty training in site updating
Web site for teachers	1. WZP I 2. WZP II	Faculty of Humanities and Social Sciences, University of Zagreb	1. Web design and teacher training in site updating 2. Digitization of teaching materials and their integration into online

			versions of courses
Website for students	1. WZS I 2. WZS II 3. WZS III	1. Information Science Students' Club "KSIZ" 2. Italian language and literature Students' Club "Pinocchio" 3. Ethnology Students' Club "Domaći" 4. The Association of the blind and visually impaired students "Šišmiš" Croatian Association of Shipbuilding Students	1. Designing news websites with member database and promotional materials for the club 2. Website design and training members in updating 3. Collecting and digitizing data, website design, translation into English
Website for school library	WZŠK	1. Elementary School "Medvedgrad", Zagreb	The school library's website design which is to facilitate students with an insight in the library fund and preferred literature and also inform them about the activities and working hours of the library. The site contains the links to the library fund, the activities, reading lists, etc.

Table 3: SL projects at the Department of Information Sciences (3/4)

Project theme	Theme abbreviation	Partner	Short project description
Web for a broader social community	1. WZDZ I 2. WZDZ II 3. WZDZ III 4. WZDZ IV 5. WZDZ V 6. WZDZ VI 7. WZDZ VII 8. WZDZ VIII 9. WZDZ IX 10. WZDZ X	1. Cerebral Palsy and Children Paralysis Association 2. The Association "Yoga in Everyday Life" 3. Vocal Ensemble "Dišpet" 4. Scouts and	The collection of documents and digitization of data, data processing, website design and training staff in site maintenance

		explorers' club "Blue Mountain" 5. The Association "In other way", school for adoptive parents 6. HDIO – Croatian Society for Internist Oncology of the Croatian Medical Association 7. A capella Christmas street singers association 8. European Youth Parliament in Croatia 9. HVIDRA – The association of Croatian homeland war invalids 10. DITS - Society of Engineers and Technicians in Samobor	
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Table 4: SL projects at the Department of Information Sciences (4/4)

Our study examined the benefit of above mentioned 40 projects for two most important SL stakeholders (students and community partners) using the Youth Service California's Service Learning Quadrant (2000), developed by the Center for Service Learning at Stanford University in California in the United States, which offers an effective method to distinguish the difference between high-level and low-level community service, as well as the difference between unrelated learning and integrated learning projects. The diagram contains two lines to create four quadrants. The horizontal line represents learning. Unrelated learning on the left shows that there is no clear ongoing connection between SL projects and the knowledge, skill or value that the student acquired

within the course, i.e. between community service and academic learning.

In the quadrant on the right, related learning shows the close connection between useful community service and the goals of academic course.

Low service projects at the bottom of the vertical line represent projects that do not meet a real need as defined by the community partner. At the other end of the vertical line there is high service, i.e., the activity that is systematically organized and meets the real need as defined by the community partner. Figure 1 graphically shows the distribution of projects in the SL quadrant after the evaluation process. Clusters are labelled with letters A-D.

Content of the projects in cluster A is directly related to the community need. In most of these projects, the students chose the project in consultation with the supervisor in the chosen NGO, school, library or museum. The teacher did not suggest any partner, NGO or topic. Each of these SL project groups met a real social need, applying the theoretical knowledge gained during their studies and acquiring new skills required for activities that they selected due to their interests.

In cluster B the students also applied the knowledge gained during their studies for the design of SL projects. However, the choice of the projects was limited to website development and thereby the application of theoretical knowledge was reduced to a narrowly specified area. The scope of additional skills and knowledge gained through the project was considerably smaller than the knowledge and skills of the students in cluster A. The students of librarianship had the opportunity to provide instruction for school librarians on using and updating the web. Also, Information Technology students with teacher

orientation designed the websites according to the needs and interests of school children and teachers, having an opportunity to work in a school setting.

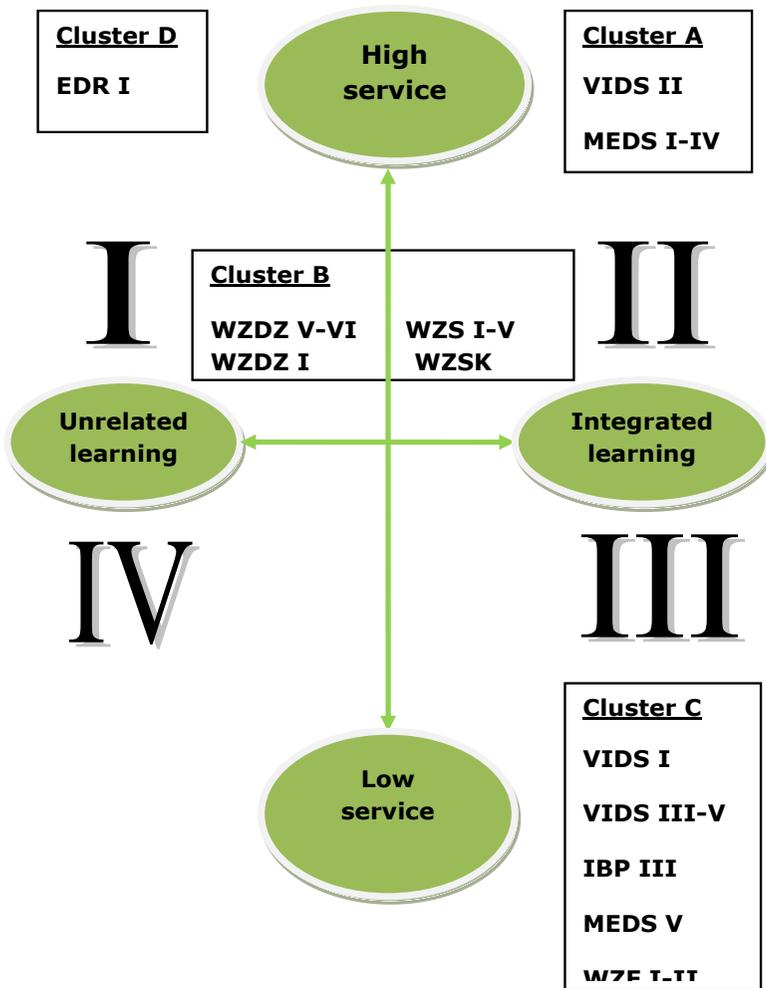


Figure 1. The quality of integration of high service and academic learning in the study of Information Sciences

Cluster C contains high-quality projects in which students applied a full range of knowledge acquired in college, deepened the knowledge and achieved

interesting results, but they did not meet the social needs defined by SL: it was not an activity performed in a new environment that is challenging, where they could have faced unplanned problems and frustrations. These were exclusively the projects for students and teachers at the faculty, during which the students did not have to leave the faculty in any particular point in time, or participate in an unknown environment, which is an important component of the SL project.

Cluster D contains projects which are characterized by high-quality community service that was not well connected to learning objectives and goals of the study. In one project, the students have designed a workshop in English for children in the town library. Although the project was useful for children, it was associated with the objectives of the study of English language and literature, rather than Information Science and the only role of the library was to provide the activity space. If the students were to create a workshop for children that would make the inventory of the library closer to them, then it would be a good SL project that meets social needs and objectives of the study. In another project, the students were engaged in digitization of teaching material for a specific academic course and they integrated this material in the online version of the course. Although the project was useful for teachers of that particular course, the students' activity did not require a high level of linking of theoretical and empirical knowledge, i.e. the project did not represent a satisfactory intellectual challenge for the students to encourage them to further connect knowledge and concepts of the study.

3. Service Learning Stakeholders' Benefits

A. Students

Since students are the most important stakeholders in the successful academic education and the most important asset of a university, we conducted student satisfaction analysis in Academic Year 2009-2010. It was performed as an online survey that aimed to identify the impact of SL on our students and the benefits it brought to them. The survey consisted of questions that tried to encourage students to critically reflect on their SL experience, but also to reflect on the community partners and the course itself. The survey consisted of 20 questions and asked the students the following:

- sex
- if they dealt with volunteering prior to work on SL projects
- if they would recommend the next generation of students to enrol in the course
- if they find 5 ECTS credits and schedule 1 hour lectures + 3 hours of seminars satisfactory
- if the SL project work was a rewarding experience
- if they perfected some existing knowledge and/or skills
- if they adopted some new knowledge and/or skills
- if they would volunteer on their own after project completion
- which of the activities they find more appealing: volunteering unrelated to the course and studies or volunteering which is directly linked to courses and the study
- whether their SL experience was: more educational than the traditional seminar at the university, the same as traditional educational seminar at the university, or less educational than the traditional seminar at the university

- to assess the overall quality of their service learning experience (on a scale 1-4, where 1 = poor, 4 = excellent)
- if they would recommend the community partner to future students
- if they think that participation in SL project should be compulsory for all students at the Faculty
- on a scale 1-5 (1 = strongly agree, 5 = strongly disagree) the students had to assess whether after the SL projects they:
 - a) better understand the needs and problems in their local community
 - b) feel responsible for progress in their own society
 - c) became aware of some personal bias
 - d) think that the social aspect of the course demonstrated how they can become involved in community activities
 - e) still plan to volunteer and assist the community
- on a scale 1-5 (1 = strongly agree, 5 = strongly disagree) they had to assess whether after the SL projects they:
 - a) think they better adopted the content of the course and study through the application of knowledge to real problems
 - f) reflect on their future career and educational objectives
 - g) think that the idea of service learning should be implemented in more courses at the Faculty
 - h) want to encourage other students to enrol in the SL course
 - i) think that their SL project was really useful for the community
- what they find as most important in their SL experience
- to which of the following areas the project had a positive impact:

- a) the future choice of courses
 - b) attitude towards study and work after study
 - c) the relationship with the professor of the course
 - d) the decision to continue their studies after graduation
 - e) adoption of specific skills and knowledge
 - f) attitude toward service learning projects
 - g) attitude towards Faculty where SL projects are implemented
 - h) self-confidence
 - i) ability to work in teams and learn
 - j) insight into personal weaknesses and abilities
 - k) feeling of personal achievement
 - l) a sense of social responsibility or community involvement
 - m) moral/ethical development
 - n) development of skills such as communication, problem solving, persistence
 - o) understanding social differences
 - p) application of knowledge gained in the study
 - q) enrichment of knowledge gained in the study
 - r) the desire to help others
 - s) knowing the society they live in
- suggestions and comments on the community partner
 - evaluation of teachers and community partners on the scale 1-5 (1 = strongly agree, 5 = strongly disagree)
 - a) kindness and availability of teachers and undergraduate assistants (e-mail, consultations, etc.)
 - b) kindness and support of community partners
 - c) adequate access to information and help with gathering materials

- d) meaningful tasks and objectives of the project
- e) recognition of personal efforts and work

Through this survey we learned on students' SL experience. All students (100%) think that the SL project was a rewarding experience and that they expanded their existing knowledge and skills. The survey numbers show that the majority of our students are willing to volunteer in the community after the completion of the project (92.9%). The overall quality of their service learning experience was rated high, with 85.7% of respondents stating it was excellent or good. Furthermore, 71.4% think their SL experience was more educational than the traditional seminar at the university. In regards to the relationship with the community partner, 92.9% of the students would recommend the community partner to future students.

Regarding the SL project influence on students, 50% of them strongly agree or agree that they understand better the needs and problems in their community, 57.1% strongly agree or agree that they feel responsible for progress in the society, 85.7% of students strongly agree to encourage other students to enroll in the SL course, while 78.6% strongly agree or agree that the social aspect of the project demonstrated how they can become involved in community activities. Furthermore, 78.5% strongly agree that they learned better the content of the course and study through the application of knowledge to real community problems, while 57.1% strongly agree that this was a chance to reflect on their future career and educational objectives. They consider the most important aspects of service learning to be teamwork, interaction with the client, references for their CV, communication skills, applying knowledge and being able to give of themselves.

Additionally, 85.7% of them agreed the project improved the application and enrichment of knowledge gained in the study as well as the ability to work in teams and increased their feelings of personal achievement. Moreover, 71.4% of them agreed the project fostered the desire to help others and a sense of social responsibility and involvement in the society. Finally, 78.6% of them agreed that it increased their self-confidence and skills such as communication, leadership team skills, problem solving and persistence as well as the insight into their personal weaknesses and abilities.

Based on the above described experience, it can be concluded that service learning offers students a unique opportunity for recognizing the complexity of the concepts of academic courses and research issues. In addition to the adoption of theoretical knowledge, these projects enabled the students to integrate the knowledge with experience. The projects also enabled the community to solve some problems and to strengthen its connection to our university. Finally, the commitment of students to the idea of service learning made it possible to satisfy the most frequently mentioned student expectations: teamwork, fieldwork and work on student's skills, competences and practical implications of gained knowledge.

B. Community Partner and Local Community

Our community partners from the non-profit sector offered students real-world problems, donated time to student activities and provided additional learning opportunities teaching students about their business. In return, they (and their clients from the local community) gained free solutions and expertise from our students and benefited from valuable human capital (students). They gained services that they could not afford to pay due to restricted resources. Furthermore, the non-profit sector successfully

assisted local community with IT issues through student SL projects.

If successfully implemented, student SL projects bring benefit for both community partner and local community at large.

In order to assess the benefits of service learning for this stakeholder, it was necessary to gather information about students' performance, involvement and SL project quality directly from the community partner. For this purpose, we designed a tool in form of the initial and final interview conducted by the student control team. Final interview at the end of the semester was based on:

- Perception of the students' commitment
- The level where the students met (or did not meet) their expectations
- Individual assessment of the quality of students' work (executing tasks, professional conduct with customers, work independence, attitude towards community partner, self-awareness, efforts to acquire the necessary skills and knowledge)
- the actual benefit of the project for community partner or their clients

All our community partners reported satisfaction with student participation in these final interviews. In addition, 78.6% of our partners strongly agreed or agreed that the SL project was really useful for society. All of them expressed interest in future collaboration with our institution and our students, establishing a long term bond with our Faculty. Furthermore, relationships developed between students and community partners sometimes led to other future mutual benefits after the project was over, such as professional career placements. One of our students received a job offer from the NGO

"Friends of Animals" for the position of information technology manager.

Finally, student project presentations at the end of the course enabled different community clients to interact with each other and build networks.

C. Faculty

Many faculty members (including authors of this paper) state the following benefits of SL: taking on new roles, enhanced teaching as they actively mentor students, seeing students excited and effectively grasping the curriculum, building richer and longer lasting connections with students, learning from and about our students and seeing greater student involvement in discussions and the relevance of the subject.

Faculty members are able to do relevant and meaningful teaching with their students, teach in the energized classroom environment and stay updated in their field and community issues. They have the power to position their universities as service branded, increase their credibility and become increasingly networked and connected. In times when university budgets are tightening, the faculty members that implement service learning offer the university chance to contribute to the community, enhance university significance to the community and improve the perceived relevance of their research.

Finally, community partners begin to perceive faculty members as pragmatic experts who are willing to help a community with its issues, while faculty members become aware of their positive impact on the local community.

D. Higher-Education Institution (University)

Service learning not only contributes to students' future career development, but also enhances the reputation of a university to the broader community. Such a university takes care of its students and their learning experiences. It provides the opportunity for each student to engage, making the SL experience possible. One of our students was offered PhD full time scholarship at University of Canterbury in Christchurch, New Zealand to conduct research on the contribution of service learning in higher education to post-disaster recovery. Since the development of SL in Croatia is still at very early stages, our Faculty was very satisfied for being recognized for educating young experts in the field of service learning.

Furthermore, our satisfied community partners speak with other partners about the high quality education being delivered at our university, and how students directly assisted in their businesses development.

University reaching out to community in such a way adds value to the community development, becomes relevant to the community and participates in value creation for community through sharing resources for the benefit of all stakeholders.

4. Service Learning Stakeholders' Potential Issues

With so many obvious benefits, one might think that faculty members in Croatia would universally embrace service learning with great enthusiasm. Unfortunately, that is not the case. Barriers against its integration in the Croatian curriculum include: scarce administrative support, faculty participation and budgetary constraints.

Although perceived as a successful and innovative teaching strategy and although it received strong

support from the Dean of the Faculty of Humanities and Social Sciences, the number of faculty who have implemented SL as a teaching strategy is very low, which is the main problem regarding service learning in Croatia.

When asked if they plan on incorporating SL into their teaching, a certain number of faculty members expressed worry that this teaching strategy is more time-consuming and requires more devotion than traditional seminar teaching. They also mentioned logistical difficulties in implementing SL, since their class is usually large and it is hard to organize students in groups with similar levels of motivation that will work productively at the same pace.

Regarding the logistics, teaching loads in Croatia are really heavy. For example, a single bachelor course at the Faculty of Philosophy, University of Zagreb has 60 students on average enrolled every year. Apart from the SL issues, another issue is that our faculty teachers lack autonomy in curriculum design. The Croatian Ministry of Science, Education and Sports designs the curriculum and dictates what shall be taught and, unfortunately, the faculty members have a relatively minor role in that process. Consequently, faculty teachers have less freedom to innovate in their teaching, but also little tradition and motivation to innovate.

The other issue is that universities in Croatia are often criticized for their lack of interest to engage in community needs.

We believe that if our university would start encouraging and financially supporting service learning courses among professors, they could improve their curriculum and help their students in developing important skills and gaining career related experience.

Such support could significantly encourage teaching innovations and faculty motivation.

Considering other service learning implementation issues, in the beginning of the implementation process it was not rare for community partners to express reluctance to recognize student competence regarding the problem at hand. On the contrary, at the end of the semester, all partners were extremely satisfied with the student service and proficiency. The students have developed a sense of civic responsibility and broadened their perspective of learning as well as the power of education.

Finally, we believe that the most challenging issue between all service learning stakeholders is to build and maintain relationships mutually sharing time, expertise, decision making as well as material resources.

Conclusion

Service learning pedagogy enabled our students to apply theoretical learning in a real-world setting. They went beyond the classroom to address real-life issues and gained a sense of confidence about the quality of contributions they would be able to make as information professionals in the future. Obvious student benefits are superior learning of course material because of increased interest and excitement about the project. Service learning offered them a unique opportunity of recognizing the complexity of academic courses' concepts and research issues.

On the other hand, our five-year service learning research and experience shows that faculty members who replace the seminar part of their course with SL projects (in other words: those who replace imaginary problems and solutions with real community experience) never give up this teaching method, no

matter how scarce the budget or administrative support may be. On the contrary, they enthusiastically continue to motivate students to enroll and they emphasize that every year it becomes less time-consuming, more meaningful and definitely more than a setting to teach theoretical concepts in a hands-on manner, once they get past the initial logistics.

Service learning enhances not only core teaching, but also the research achievement of the faculty, relating academic research and teaching more closely to real-world issues. Moreover, interdisciplinary and multidisciplinary research projects can be developed among colleagues toward the realization of faculty goals such as enhanced teaching, improved community service, and even personal tenure aspirations.

These benefits outweigh the logistical problems. Therefore, we believe that we need to discover the key motivators to raise Croatian faculty's interest in service learning.

We also believe that if our university sets service learning as one of its mission, it could stand out among other universities and become leader in multidisciplinary research and teaching opportunities, modelling a socially responsible behaviour for its students and gaining recognition from external stakeholders such as funders, government officials and community leaders.

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CHAPTER 19

INNOVATION AND COOPERATION BETWEEN BUSINESS AND UNIVERSITIES: COMPARATIVE ANALYSIS AND EDUCATIONAL IMPLICATIONS

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Abstract

The collaboration and transfer of knowledge between universities and the business sector is currently considered to be one of the essential vectors in the development of effective innovation systems; as proved over the years by various European Community documents, studies and research reports by numerous authors, as well as national and regional institutional documents.¹ In this sense, over the last two decades, the pressure on universities to increase their contribution to society's needs has been

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significantly felt; particularly with regards to their contribution to economic, social and cultural development.

Given these premises, the focus is on the study object, whose aim is to firstly reflect on some of the conditioning factors of innovation and transfer. Secondly, some of the results which were obtained in the research framework developed in Galicia (northern region of Spain) were gathered, regarding the mechanisms of university-company collaboration and transfer.

To do this, two questionnaires were developed within our university's framework, one aimed at the managers of the universities' research groups and another aimed at the company directors to gather their perceptions and valuation in the aforementioned fields (innovation, cooperation and transfer). The sample was formed by 123 research group managers and 801 company directors from the North-east of Spain.

1. Introduction

In this work we question whether the university research group (research unit) directors and the company executives perceive both sectors as being able to undertake innovation and cooperation (transfer) activities. Moreover, the analysis also takes us to consider to what extent these innovation and cooperation processes are affected by the globalization and internationalization phenomena, and by the decline in financing resources, among others. From this point one of the purposes of this article is to explore the perceptions of a sample of university research group directors and Galician company executives (Northwest region of Spain) in relation to these fields. We consider that from the analysis of these fields, and from the factors that favor and inhibit this collaboration we can draw conclusions for its improvement and strengthening. In particular, the formulated objectives in our study are:

- To identify innovation indicators (human resources, financing and marketing) at university and in enterprise.
- To give details of the interaction between both sectors.
- To offer proposals to improve the university-enterprise collaboration.

Actually, we use as a starting point the hypothesis that the collaboration between the university and the company has been poor in the past; yet some of the policies of the European Community of recent years were on track to strengthen innovation as the key form of collaboration between both sectors, claiming more financing.

However, now different perspectives exist about the need of university research group directors and the company directors to converge in a united effort in collaboration on important points such as innovation, human resources, financing, the marketing of products, the collective taking advantage of infrastructures and training. On one side, they do not accept that there is place for the same or similar changes in universities and in companies; based on the fact that a lot of universities have centuries of history, they are extremely durable institutions and have been able to adjust to different circumstances. But on the other side, other experts have asked, with considerable evidence, if the actual university can maintain the same quality with less resources and adjust to the new realities of globalization, internationalization, liberalism and marketing, and provide the specializations required by employers without making profound changes.

It's possible to think that privatization in a lot of sectors and the search for individual results point more to separation, but well-founded reasons also exist to believe that collaboration can drive greater

efficiency and production of results in a mutual way. In effect, from many fields, especially in politics and the academic sector, the idea has been advanced in recent years of fomenting greater collaboration. The analysis of the university-company interaction and collaboration obliges us also to recognize that the university is not actually the only type of institution that creates and provides access to knowledge and that can facilitate the learning of students, making them able to use and create research. The role that was played in the past has changed. In reality, universities actually look to present themselves as useful to all consumers, they do marketing to capture students: they are concerned with their access to employment; they promote learning throughout life; they are committed to evaluation providing standards of quality; they diversify their sources of revenue and try to improve their ranking in research. They also practice a lot of these roles, with their own special features, and they can take them on as their own, the companies.

The European university in the space of forty years or less has moved from being an elitist to being a university for the masses. This has profound consequences in regard to the definition of its purpose: its place and weight in society; the legitimacy of groups that it comprises of and the vision and performance of this institution. As a result of this overcrowding it has had to negotiate forms of government, access demands and market demands of work. But also, to maintain a university of the masses has its new social and economic obligations that are difficult for the State to take on and finance. Doubts actually exist whether this development can be sustained in the future without broad collaboration with the wider community. In this respect, Olsen and Maassen (2007, p. 4) write "universities should ... be

better integrated into society, in particular into industry and the business community...”

In this context, we understand that universities will see themselves as obliged to establish a greater number of links with companies and the communities in which they exist and in parallel, they will need to extend their frontiers much further beyond these. Although advances prevail in the increase of research contracts, in collaboration partnerships for students doing work experience, in the training programs required by companies, etc., the evidence suggests that, in difficult circumstances, the challenges and the demands are greater.

2. New challenges for university and company collaboration

The European Community, national and regional governments and society demand a new role for the university. In effect, the university is required to have a role in accordance with the community in which it exists and which sustains it; it is required to be pioneering in its work and management, it is expected to be effective in its teaching (taking from the market flexible, innovators, responsible professionals who have practical experience) and also to be productive in its research (inventions and innovations). Ultimately, it has to show excellence, reputation and standards of quality. But also, for economic imperatives – given the actual reality – it is obliged to be competitive, to be enterprising and innovative. In fact, the idea coexists, independently, of the university as a public service that aims for effective teaching and the advancement of knowledge; at the same time being influenced by neoliberal ideas of efficiency and competition. However, it tries to reduce costs “while seeking to enhance revenue through various entrepreneurial ventures that extend the boundaries of the institution” (Toma, 2011, p. 195).

In the report *Lambert Review of Business-University Collaboration* (2003, p. 107) acknowledges that “the role of universities is to educate students, rather than to train them for the specific needs of businesses. But it is important for the economy [...] that students leave universities with skills that are relevant to employers” is recognized. Meanwhile, Srisa-An, W. (2000) said that new educative needs cannot be satisfied alone by the university, and that a collaboration between universities and between the university and the company is necessary.

At the same time, conscious of the need to develop initiatives that favor the incorporation of the labor market, it tried to establish a political and legislative policy which includes the importance of the entrepreneurial spirit. This consists of a person’s ability to convert ideas into actions. It includes creation, innovation and risk taking, as well as the ability to plan and manage projects aimed at achieving objectives (European Commission, 2009).

Along the same lines, the Strategy, *Europe 2020. A European strategy for smart, sustainable and inclusive growth*, the European Commission (2010) proposes that the constitution of a knowledge and innovation based economy includes, amongst others (pp. 11-12):

“This requires improving the quality of our education, strengthening our research performance, promoting innovation and knowledge transfer throughout the Union, making full use of information and communication technologies and ensuring that innovative ideas can be turned into new products and services that create growth, quality jobs and help address European and global societal challenges. But, to succeed, this must be combined with entrepreneurship, finance, and a focus on user needs and market opportunities”

In addition to a series of meetings on a European level held in Sorbonne, Bologna, Lisbon, Salamanca, Prague, Barcelona, Graz, Berlin, Bergen, London and Glasgow...aimed at, amongst others, to harmonize higher education within the European Union and increase the role and relevance of research, adapting it to society's technological, social and cultural needs.

However Europe, which has just made changes in its university teaching, following the Bolonian model as well as economic integration, is now seriously affected by the economic situation which shows that the international premium is over the national and the economic over all the others. Indeed, governments that adopt financial cutback measures for research funding make these units resentful, it makes it difficult to obtain human resources and consequently, the research groups productivity is likely to reduce.

Moreover, a brief reflection on businesses leads us to position ourselves not so much in neoclassical models, but rather in an evolutionary perspective and structural changes which are considered not only changes in the processes that change the productivity and cost structure of some companies over others, but also product innovations that lead to changes in production structure.

The change consists in overcoming the starting point that all companies are alike and have identical behaviors and go on to argue that there are various forms of performance and that technological, social and organizational innovation plays a central role in creating differences in processes and products. And so, the latter approach results in a competitive and selective evolutionary process in which some companies experiencing growth, some stagnate and others disappear.

From this perspective, economic growth requires an innovation system that is organized through the co-evolution of technology, businesses and institutions. This leads from a lineal innovation model to an interactive model that includes a chain of relationships between research, production and marketing. There is therefore a need to create networks of companies, research institutes and university-company, bank-company and bank-university collaborations. And it reminds us of the advantage of coordinating synergies at a level of human resources, technological capacity, and availability of financial resources, infrastructures, information and training.

The current environment requires companies to provide innovation, differentiation, quality, faster production processes, a variety of goods and services and marketing strategies. It also requires taking into account the globalization and internationalization processes of financial markets.

When this doesn't happen, thousands of companies who were up until recently present in our streets or industrial parks close because they cannot compete due to, amongst others, the emergence of the metropolitan shopping centers. This goes to show that the markets are becoming ever more global and competitive. This forces us to continually face new innovative challenges which cannot be ignored by either business or academia. In this situation, many authors advocate an entrepreneurial university, efficiently governed, with leadership, customer focused and adapted to its environment, but at the same time, subject to accountability through evaluation and accreditation mechanisms (Cajide, 2000; Cajide and others, 2006).

Globalization is another conditioning factor for universities and companies. The impact of

globalization has also been recognized by authors such as Gaffikin & Perry (2009, p. 118) when they write:

“Expression of this dynamics in the United States takes an acute form. Over the past four decades, its base economy has substantially shifted from industrial/manufacturing to post-industrial/service, a structural change that has had significant impact on the relation of production, the space and time of markets, and the products around which they are organized”.

Indeed, we are seeing structural changes embodied in the emergence of new sectors of industrial activity, expansion and diversification of services, the emergence of knowledge-based economy, globalization of information and financial markets and new organizational forms of production (business alliances, subcontracting, flexible specialization ...). This is noted in recessions in the industrial sector faced by the spectacular advance of the services sector due to, amongst other factors, consumer demand. The structural changes are affected by "knowledge-based economy" (David and Foray, 2002).

Thus, of course globalization, as a process of increasing interdependence and convergence of economies and liberalization of markets, has an impact on universities, but also in other sectors such as companies still attached to the times before the previously protected locales. Its effects are felt in fields as important as communications, airlines, shipbuilding, banking, energy, steel, transport, etc. Indeed, when firms are absorbed, sold or closed due to several factors, this usually leads to losses and consequences for areas in which they operate, both nationally and regionally. Collaboration is lost with universities, scholarships, social services, receiving trainee students, employment for graduates, there is migration of talent to other communities, etc.

Therefore, there is a need for human resources (highly qualified), funding for research and innovation and infrastructure and technology to address the international socio-economic reality and help to prevent the strangulation of national and regional companies.

These issues obviously require us to constantly question the essence and functions of universities and the survival of companies and their mutual relations. In that respect, Mok (2009, p. 287) states that "the role of universities has changed in such a way that they act less as critics of society but more as servants responding to the needs of the economy..." Just as Altbach & Teichler (2001, p. 24) write "Internationalism is a key part of the future, and higher education is a central element in the knowledge-based global economy".

Attached to these concepts, another of the constraints that the university should consider is market orientation, seeking effectiveness of work performed. Brown (2011, p. 17) defines this process as "...marketization [that is]-the organization of the supply of higher education "services" on market lines.

Therefore, in these coordinates, universities cannot be the worst managed institutions in the words of an author, nor may cling to a tradition, however glorious it may have been. The new challenges of the university are, amongst others, internationalization, promote aggregation, improve the dynamics between teachers and students and change their framework, which up until now has been very closely associated with centres and departments. This implies the need to connect with science parks, businesses and cluster and network infrastructures that facilitate competition and efficiency from university-society-environment collaboration perspectives, trying to take into account global, international, national and regional.

And from a company's point of view, no innovation system is self-sufficient. We must recognize the globalization of innovation processes and think that the absorption of these in turn also requires innovation, ability to assimilate and adapt to the successive changes. The lack of that technological capability reduces the competitive and adaptability capacity and quite possibly leads to "the progressive exclusion of the markets." (Vence, 2007, p. 53).

3. Innovation processes as economic development indicators

In recent years, innovation has become a tool to combine the need for change, while regarded as indispensable to the proper functioning of national economies in the global competitive environment.

The concept of innovation is complex and can be analyzed from different perspectives. In a broad sense, innovation is any change that generates value. On the other hand, an approach from the field of economic theory leads us to pick one of the most internationally widespread and accepted definitions, which includes the *Oslo Manual* (OECD, 2005), which indicates that: innovation is the introduction of a new or significantly improved product (good or service), of a process, of a new marketing method or of a new organizational method, in internal company practices, workplace organization or external relations.

Since 2005, the World Economic Forum collects, through the Global Competitiveness Index, microeconomic and macroeconomic bases of the competitiveness in different countries. This index includes innovation as an essential component of competitiveness, alongside the institutional framework, infrastructure, macroeconomic stability, health and primary education, higher education and training, market goods efficiency, labor market

efficiency, financial market sophistication, technological readiness, market size, and finally, business sophistication (World Economic Forum, 2010).

Along this line, if one analyses the rate of innovation capacity in 2009-2010 from the data published in the *Global Competitiveness Report 2010-2011* (World Economic Forum, 2010), we find that 7 European countries are among the top 10: Germany (1st), Sweden (3rd), Switzerland (4th), Finland (5th), France (8th), Denmark (9th) and Holland (10th).

The OCDE document (2010) *The OECD Innovation Strategy: Getting Start on Tomorrow* raises several courses of action to overcome the shortcomings of the factors that directly or indirectly affect the development of innovation, amongst which include: empowering people to innovate; release the innovative potential fostering an environment that is safe and open to competition and innovation; create and apply the knowledge aimed at empowerment and adequate funding of the public research system; implementation of innovation to address social and global challenges through improved international cooperation in science and technology and the transfer of technology; improve governance and indicators to measure innovation policies encouraging local and regional actors to promote innovation and ensuring the necessary coordination.

As evidenced by this document, this includes emphasis, amongst others, on two aspects: adequate funding and the necessary transfer of technology between academia and industry.

4. The Importance of Investing in R&D and Innovation

Such as is signalled in the *European Innovation Scoreboard 2009* report, one of the main drivers of growth is the funding and support for research and innovation -being that these affect the progress and development of contemporary society- through means of public investment and government support for these activities as well as private credit.... indeed, it is understood that part of a country's capacity for technological innovation rests on its investment efforts in technological research and development as well as in human capital dedicated to R&D.

That is also how it is understood in the *Cotec Report 2010. Technology and Innovation in Spain* (COTEC Foundation, 2010), which asserts that (p. 23):

“A country's capacity for technological innovation is supported fundamentally by its investment efforts in technological research and development (R&D), its search for human capital trained to acquire knowledge, and by its efforts to develop technologies of any existing forms in the presence of a business network capable of taking advantage of the sources of knowledge and technology within its reach in order to produce new products and services that generate business as well as improve competitiveness”.

In the same way, the usefulness of the structures that deal with transfers is linked to the funding of research and development, so much so that the more investment in the development of the R&D activities of universities, companies and the very same transfer bodies, the greater its activity and effectiveness, if it is channeled properly.

In this sense, the *Global Conference on Higher Education*, in reference to the "The New Dynamics of Higher Education and Research for Societal Change

and Development" (UNESCO, Paris, 5-8 July 2009), demonstrated the importance of investing in Higher Education as an important vector in the formation of a society of knowledge as well as in the advancement of research, innovation and creativity. Similarly, insistence was made at this conference -in acknowledgement of the need for many countries to increase funding for R&D- that the institutions should seek out new forms of increasing research and development, through means of joint initiatives between the public and private sectors, covering small and medium-sized enterprises, thus emphasizing the need for collaboration between the institutions of higher education and their surroundings, including the business sector.

On the other hand, in 2009, the European Union promoted the *European Year of Creativity and Innovation*, giving way to the *Innovative Manifesto (Eur Activ 10/11/09)*, which indicates, among other matters, that "In order to advance, Europe should increase investment, public as well as private, in acquiring knowledge" (p. 1). Additionally, included as the first line of action is *investment in knowledge*, a means of reinforcing the competitiveness of Europe with regards to what is indicated, which is that "new budgetary principles giving greater priority to investments in people and knowledge are necessary, and the magnitude of the European Structural Funds should be broadened, centring itself on investments in research and development..." (p. 3).

Effectively, as indicated in the Communiqué of the European Commission, *Europe 2020: A Strategy for Smart, Sustainable and Inclusive Growth*, Europe is facing a moment of transformation that requires a strategy to help it come out of the crisis strengthened and converted into an intelligent economy based on knowledge and innovation, both sustainable and integrated, which enjoys high levels of employment,

productivity and social cohesion. To that end, the Commission proposes different objectives, among them being the achievement of investments in R&D at 3% of the Gross Domestic Product (GDP) of the EU, focusing attention on the need for the public and private sectors to invest in R&D.

Additionally, it proposes seven initiatives that are emblematic of providing a catalyst for advancement in each matter of urgency; we highlight the first of them in our analysis, "Union for Innovation", which focuses on improving the general conditions and access to funding for research and innovation, for the purposes of reinforcing the chain of innovation and stimulating levels of investment throughout the whole of the European Union as a means of guaranteeing that the innovative ideas can be transformed into products and services that generate growth and employment.

In any case, although the increase of financial resources for research and innovation has been a trend in recent years, the financial crisis could prove to be an impediment to this progress. In Spain, this investment in R&D continues to be inferior compared to the European average. In fact, according to data from Eurostat, in Spain, investment in R&D for 2008 was 1.35% in relation to GDP, thus failing to reach the average of the European Union or that of other countries that lead the way in research and innovation.

5. University-Business Transfers: The Necessary Collaboration Between Both Sectors

In place of development of efficient innovation systems, collaboration and transfers of knowledge between the university and business sectors are, at

present, considered to be indispensable vectors. To that effect, in recent years many authors, research reports and institutional documents have defended the benefits of said collaboration, some of which bear mentioning, including the contributions of the university institutions to the productive sector of counsel, access to information and scientific & technological infrastructure, and the involvement of excellent human resources in the development of projects; meanwhile, the business sector would provide the university with additional funding and an improved professional profile, among other things.

Indeed, in the European Research and Innovation Area, the reinforcement of the bonds between higher education and its environment is positioned as one of the key points in its development, through knowledge and technology transfers generated at public research centres and universities. Therefore, one of the priorities in the policy trends regarding innovation has been centred on cooperation, which should establish itself within the institutions of Higher Education as well as research centres and companies, while at the same time effort is being made to stimulate innovation from the European SMEs (Small and Medium-Sized Enterprises), such as is put forth in the various documents and agreements that have been carried out in recent years via the European Commission.

The situation described therefore involves the need for introducing innovations and changes into the very dynamic between universities and companies, such as in transfer mechanisms, which should contribute to business development as well as to bilateral agreements in order to promote the application and usage of research results, such as is also derived from other works such as the *First Findings from the UK Innovation Survey 2007* (Robson and Haigh, 2008); *University to Business Technology Transfer -UK and USA Comparisons-* (Decter, Bennet, and Leseure,

2007); *Summary Report for Respondents: The ASTP (Association of European Science and Technology Transfer Professionals) Survey for Fiscal Year 2007* (Arundel, Kanerva and Bordoy, 2008); *Higher Education- Business and Community Interaction Survey 2008-2009* (HEFCE, Higher Education Funding Council for England, 2010); *The European Innovation Scoreboard 2009* (European Union, 2010); *Innovación y transferencia: Reflexiones desde la Universidad y la Empresa* (Cajide, 2011).

Nonetheless, there are huge differences among the countries, with regards to the tradition, intensity and efficiency of such collaborations. As such, countries that are leaders in innovation, such as the case of the United States, are equipped with efficient mechanisms for transfers to the productive sector; indeed, the United States figures in *The Global Competitiveness Report 2010-2011* (World Economic Forum, 2010) throughout the 2009-2010 period as the top region at the global level for collaboration between both sectors. In the same manner, Switzerland, Finland, the United Kingdom and Sweden are also among the countries leading in capacity for innovation as well as in research collaboration between universities and the productive sector.

In Spain the level of collaboration between Higher Education and the business world is still deficient, finding itself below the European average. This idea is signalled in the report *Community Innovation Survey (CIS/2006)* (Eurostat, 2006), which indicates that the percentage of Spanish companies that cooperated in innovation with universities has increased with regards to the 2002-2004 period, although it continues to be below that of the European whole.

In spite of these data, Spain has in recent years carried out enormous efforts addressing the need for

developing efficient approaches towards cooperation between the university and business sectors, which have been a constant challenge in the last decade at the European level as well as worldwide. So, as is emphasised in the report, *Informe Red OTRI 2008*², the Spanish universities have continued to take up their commitments to the development of their environments, from the cultural sphere down to the social and economic spheres, in what is termed "third stream policy", an inherent part of which is made up of the transfer of knowledge. To that end, at the state level, the *National Plan for Scientific Research, Development and Technological Innovation (2008-2011)*, considers one of the six Instrumental Lines of Action (ILA) to be the one that relates to the transfer and usage of knowledge.

In the same way, within the Spanish context, the State Strategy for Innovation (Ministry of Science and Innovation, 2010) establishes the transfer of knowledge as a central element of said strategy, which consists of six themes: the generation of an environment geared towards innovation, the promotion of innovation starting with public demand, international projection, the strengthening of territorial cooperation, and human capital. The document that follows indicates that the establishment of systems that facilitate and promote the transfer of knowledge from research centres towards the productive sectors constitutes the core on which said strategy rests.

² The "OTRI" network is the network of Research Results Transfer Offices of the Spanish universities, the mission of which is to empower and distribute the role of the universities as essential elements within the national system of innovation.

6. The Perception of Research Group Management and Business Management: The Synthesis of a Research Report

From this context of study and analysis arises the interest in the realisation of research in the context of Galicia (north-western region of Spain) which serves a dual purpose: on the one hand, to become aware of the indicators of innovation, as much at the universities as with companies, and on the other hand, to identify the existing mechanisms for collaboration and transfers.

To that end, current bibliographic references and contributions carried out in distinct research reports relating to the matter at the state, European and international level have been taken into account (European Innovation Scoreboard 2007: Community Innovation Survey, 2006; UK Innovation Survey, 2007; Survey on Technological Innovation in Businesses, INE, 2007; etc.).

6.1 Method and sample

For the process of gathering information, two questionnaires were developed. The first of the two, the "Questionnaire on Innovation and University-Business Transfers" (CIT U-E) was aimed at picking up the perceptions of the directors of the research groups. The second, the "Questionnaire on Innovation and Business-University Transfers" (CIT E-U) was aimed at picking up the business perspective, through the valuation of the management of Galician businesses. Both questionnaires were posted by mail and through the internet .

The sample was made up, on the one hand, of 123 directors of research groups belonging to the three Galician universities: the University of Santiago de Compostela (39.0%), the University of Vigo (39.0%) and the University of La Coruña (22.0%). The number

of researchers that each of these 123 groups include varies between 1 and 48, adding up to a total of 774 researchers.

The directors of research groups surveyed develop their primary research activity in the areas of Experimental Sciences (30.1%) and Social and Legal Sciences (25.2%), and in greater measure in the areas of Technical Education (17.9%), Humanities (14.6%) and Health Sciences (12.2%). Additionally, this is a sample that, with regards to gender, deals with directors, over half of which are men (69.1%), alongside 28.5% which are women. With respect to research experience, the sample is composed of researchers who have a prolonged research trajectory; certainly, the vast majority of directors participating in this study (79.7%) has over 14 years of experience carrying out research tasks.

On the other hand, 801 Galician companies form part of the sample. In relation to the number of workers, a majority of the sample deals with small companies (fewer than 49 workers). The medium-sized companies (of 50 to 249 workers) only represent 6.2% of the sample and the large companies (over 249 workers) represent 1.2%. The primary geographic market for the activity of these companies is Galicia (46.6%), followed by Galicia and Spain (28.8%), and Galicia, Spain and abroad (21.1%).

In relation to the spheres in which these companies focus their activities, the sectors highlighted are the construction, food, transport & communication, and wood sectors. Also participating, although in lesser proportion, are businesses that are linked to the goods of equipment and machinery, fishing and agriculture, the energies sector, tourism and leisure, communications and information technologies, livestock, forestry, naval construction, clothing,

agriculture, health, chemical pharmacy, cultural and audiovisual industry, education, cultural heritage, etc.

6.2 Some results

The results obtained in relation to the procedures for collaboration between the university and business sectors demonstrate the convergence and discrepancies in the vision regarding their procedures for innovation and collaboration. We display them further on.

In this line, firstly, we have sought to learn the perception of the research groups regarding the contribution of the university towards the financial and social development of the region in which it is located, Galicia. In that respect, the surveys consider that the universities have fundamentally contributed to the "access to higher education" (77.2%), "collaboration in research with the business world" (58.5%), "protection and conservation of the environment" (46.3%) and "technology transfers" (43.1%). Notwithstanding, aspects such as the retention of graduates in the region and the adaptation of qualifications to the needs for training and employment are the areas in which, according to the directors, there has been less contribution on the part of the universities (table 1).

On the other hand, in relation to the opinion of the directors of the businesses, regarding the degree to which the Galician business sector has contributed to the financial and social development of Galicia, these parties highlight the increase of industrial infrastructure (61.2%), followed by other aspects such as the opening of new productive sectors (46.4%) to the creation and consolidation employment (44.4%) as well as social development (health, welfare, quality of life) (42.4%). To the contrary, they maintain that contribution has not been made in any large part

towards the retention of graduates in the region, towards collaboration in research in conjunction with other entities (university, administration...) and towards the transfer of technology.

Table 1. Contribution to the Financial and Social Development of Galicia

PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS	PERCEPTION OF BUSINESS MANAGEMENT
<p>The directors of the research groups feel that the universities have fundamentally contributed to the access to training (77.2%), to collaboration with the business world (58.5%), to the protection and conservation of the environment (46.3%) and to the transfer of technology (43.1%).</p>	<p>For the directors of the companies, the Galician business sector has fundamentally contributed to the increase in infrastructure and industrial network (61.2%), but also to the opening to new productive sectors (46.4%), towards the creation and consolidation of employment (44.4%), and toward social development (welfare, health, quality of life) (42.4%).</p>

Secondly, the directors of the research groups were asked for their perception regarding the role of the university with regards to its "third stream policy", relative to the widening of the contributions of Higher Education to the economy as well as to society, and on the other hand, they were asked for the valuation of the directors of Galician businesses with regards to the relations of the business world with their environment (table 2).

In that regard, the research groups indicated that the university relies on the infrastructure and resources that allow for innovation, such as collaborative mechanisms that facilitate university-business transfers. Notwithstanding, they believe that in spite of this, the university does not turn profits or commercialize its research and innovation results in a sufficient manner, and that its contributions to the development of the region should be greater. By contrast, only a third of the businesses say that they

have the necessary infrastructure to innovation and the majority consider that their businesses do not possess the mechanisms for collaboration which facilitate transfers with other institutions. This reality highlights the need for increasing university-business collaboration, which makes it possible to generate income from the resources available.

On the other hand, the majority of business management surveyed declared that their businesses are flexible and open to change and innovation, whilst a much lower percentage of research groups opined that the university demonstrated flexibility and openness to those processes of change. This fact could be a reflection of the greater financial projection of the businesses, the fundamentals of which are aimed at the production and sale of their services and products to society.

Table 2. Perceptions Regarding Relations with Society

PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS	PERCEPTION OF BUSINESS MANAGEMENT
- They feel that the university relies on resources and infrastructure that makes innovation possible: 30.9% give regular (moderate) indication and 48.8% great or strong indication.	- Only 30.2% indicate that the infrastructure and resources that their business utilises facilitates innovation to a great or strong extent.
- The majority hold the opinion that they are equipped with collaboration methods that facilitate university-business transfers: 30.1% make regular (moderate) indication and 42.3% great or strong indication.	- 55.7% indicate that they are equipped with scant (low) amount of collaboration mechanisms with other institutions.
- Only 28.5% of those surveyed consider the university to be responding to societal demands.	- The majority of business directors feel that their business responds to the needs and demands of their sector of activities (68.8% make great or high indication).
- Fewer than half of the group directors (40.3%) feel that the university is a flexible institution, open to change and innovation.	- 59.0% of business directors feel that their business is flexible and open to change.

It was also important to know the existence of relations between the university and the business, for that reason, we included a question on the survey on this issue (Table 3).

Table 3. Agents and Level of Cooperation

– PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS	– PERCEPTION OF BUSINESS MANAGEMENT
<ul style="list-style-type: none"> – 32.5% of research groups have collaborated on many occasions with the business sector. – 74.8% indicate that they have collaborated on some occasion. 	<ul style="list-style-type: none"> – Sólo el 19,4% del total de empresas que componen la muestra cooperaron con la universidad.
<ul style="list-style-type: none"> – Collaborative research groups only 	<ul style="list-style-type: none"> – Collaborative firms only
<ul style="list-style-type: none"> – Collaboration is generated primarily with small (30.9%) and medium-sized businesses (23.6%). – These businesses are fundamentally based in Galicia, and to a lesser extent, they belong to other communities in Spain or abroad. 	<ul style="list-style-type: none"> – These relations are for the most part of the occasional variety (76.8% of all businesses that engaged in cooperation). – Primarily, collaboration was made with the University of Santiago de Compostela (36.1%), but also with the University of Vigo (20.6%) and A Coruña (18.1%). – 24.5% cooperated with various universities, not solely with the Galicia University System, but also in other regions of Spain and Portugal. – In large part, cooperation was brought about with university departments (46.4%), although they also cooperated with institutes and research centres (14.8%) and mixed institutes (14.2%).

Table 4. Origins of University-Business Relations

PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS (Collaborative Research Groups Only)	PERCEPTION OF BUSINESS MANAGEMENT (Collaborative Firms Only)
<ul style="list-style-type: none"> - According to the directors of the research groups, the relations arise primarily of their initiative; they also admit that there is initiative coming from the business end, although to a lesser extent. - On few occasions they say that these relations arise due to the initiative of the department or institute, or from the transfer office of the university or equivalent entity 	<ul style="list-style-type: none"> - The directors of companies attribute the collaboration primarily to their own initiative as well as to the fulfilment of practices on the part of the students at their companies. - On few occasions they affirm that this collaboration is due to the initiative of the transfer office of the universities or equivalent entities.

With regards to the level of cooperation between both sectors, the perception of research group directors and business managers varies substantially. In this sense, while the majority of research groups indicate having engaged in some form of collaboration with the business world (mostly SMEs), a much smaller percentage of the sample of businesses indicates having cooperated with the university sector, further assuring that this matter has to do with relations that come about occasionally, not continuously.

32.5% of research groups participating in the study indicate collaboration with the business sector on many occasions. This percentage is greater if we include those groups that assert having carried out some form of collaboration with businesses at some point in time (74.8%). The cooperation brought about by the groups takes place fundamentally with businesses in their region and, to a lesser degree, with other communities in Spain or abroad.

The response of the business directors with regards to this same question shows that a smaller percentage of

them, merely 19.4% of all companies in the sample, have collaborated with universities.

According to the directors of research groups, collaboration arise primarily from their own initiative, although they also acknowledge the initiative of the companies. However, according to the directors of the businesses, this collaboration is essentially brought about due to the initiative of the business and the realization of internships by students working at the same. They concur, though, in highlighting that on few occasions this initiative has parted ways with the transfer offices of the universities and equivalent entities (Table 4).

With regards to the reasons given for cooperation (Table 5), the directors of research groups signal that they cooperate with the business sector to provide consultations (48.0%), raise awareness and to apply the results of their research (46.3%), to cooperate in R&D (45.5%) and to lend technological support (38.2%). Notwithstanding, other aspects such as working together in patent licensing (9.8%), research personnel exchanges (12.2%) and imparting training demanded by business (22.0%) are not indicated by the research groups as motives for frequent cooperation.

On the other hand, the primary motives for the businesses to collaborate with universities are: to facilitate professional practice for university students (51.0%), to obtain counsel (43.8%), to learn and apply research results (27.5%) and to improve personnel training (25.5%). Some companies (17.6%) also collaborate in order to access and utilise the infrastructure and installations of the universities as well as those with which they are equipped. Notwithstanding, on few occasions cooperation has been linked to foment creativity and participation in

mixed groups (7.2%) or to work together in patent licensing (2.6%).

Table 5. Reasons for Cooperation

<p style="text-align: center;">PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS (Collaborative Research Groups Only)</p>	<p style="text-align: center;">PERCEPTION OF BUSINESS MANAGEMENT (Collaborative Firms Only)</p>
<ul style="list-style-type: none"> - The motives for cooperation are primarily to provide counsel (48.0%), the inform about and apply research results (46.3%) and to collaborate in R&D (45.5%). - Other reasons for cooperation are to lend technological support (38.2%), to facilitate practice for students at companies (26.8%), to foment creativity or participation in mixed groups (26.8%) and to impart training in demand by businesses (22.0%). - On rare occasions an exchange is brought about in research personnel (12.2%) or they work together in patent licensing (9.8%). 	<ul style="list-style-type: none"> - The reasons given by companies for cooperating are the following: to facilitate professional practice for the university students (51.0%), to receive advisement (43.8%) and to learn and apply research results (27.5%). - 25.5% indicate that they cooperate with universities to improve personnel training at the company (almost the same percentage as in the case of research groups). - 17.6% also collaborate in order to access and make use of the infrastructure and installations of the universities. - On few occasions, they signal creativity and participation in mixed groups (7.2%) and working together in patent licensing (2.6%).

With respect to factors that inhibit collaboration (Table 6), the groups signal that they are equipped with little time for the tasks that these relationships carry with them, insufficient institutional support, lack of financial resources, difficulties in contacting companies and the absence of companies that are adequate for cooperation. Meanwhile, the directors of companies note the little knowledge of the universities research groups with which they collaborate, the low usefulness of this collaboration, and the lack of personnel experience of the company in these tasks. Additionally, they concur with the groups when it

comes to the lack of financial resources to sustain these relationships.

Table 6. Factors that Inhibit or Block University-Business Collaboration

PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS	PERCEPTION OF BUSINESS MANAGEMENT
<ul style="list-style-type: none"> - Primarily, the lack of time that researchers have for these relationships (52.0%), insufficient institutional support (45.6%), lack of financial resources (43.1%), difficulties in contacting companies (41.5%) and the absence of adequate companies for cooperation (41.5%). 	<ul style="list-style-type: none"> - Fundamentally, the unfamiliarity of the groups with which they cooperate (67.2%), the impression that the relations are not useful to the company (47.2%), the lack of experience of the personnel in those tasks (35.2%), and the lack of financial resources for these relations (33.1%).

With respect to the mechanisms that promote these relations between the university and the world of business (Table 7), the directors of research groups surveyed indicate the presence of strategies for coordination between both sectors (43.9%), mixed institutes (43.1%), the transfer office of their university (40.7%) and scientific and technological parks (38.2%).

Table 7. Agents and Mechanisms That Promote Cooperation between the University and the World of Business

PERCEPTION OF THE DIRECTORS OF THE RESEARCH GROUPS	PERCEPTION OF BUSINESS MANAGEMENT
<ul style="list-style-type: none"> - The strategies for coordination between both sectors (43.9%), the presence of mixed institutes (43.1%), the means of the transfer offices of the university (40.7%) and scientific and technological parks (38.2%). 	<ul style="list-style-type: none"> - Through means of coordination strategies between both sectors (54.9%), scientific and technological parks (43.7%) and in lesser measure, the mixed institutes and departments or offices for research and innovation at their company (35.0% in both cases).

In the same manner, the directors of the companies indicate that the university-business relations are

fomented mainly through coordination strategies between both sectors (54.9%) and in large part through scientific and technological parks (43.7%), mixed institutes (35.0%) and the departments or offices for research and innovation at their company (35.0%).

7. Some conclusions and implications for educational policies

As we conclude our observations in this project, it turns out to be undeniable that innovation and collaboration between the university and its environment at present make up a fundamental part of the process of the financial development of a country or region. That is what is made manifest in the results of different studies, the trends in policies of innovation in recent years and, more specifically, in the results of our study.

- The majority of the directors of research groups indicate having collaborated with the business sector, although less than a third affirm having collaborated on a frequent basis. The percentage is still smaller for the companies, of which less than 20% indicate collaboration with the university, and of those that do, the vast majority indicate that the relations are only occasional.
- Indeed, the research groups feel that the university relies on infrastructure and resources that make innovation and collaborative mechanisms possible; nonetheless, they still believe that the results are not made profitable or commercialised sufficiently. In addition, they stress that their contribution to the development of the region should be greater.
- The directors of companies as well as the directors of the research groups indicate that on few occasions the collaboration between both sectors comes about via the transfer offices of the university.

- Research groups as well as businesses are both in agreement with regards to laying out, among the primary reasons for cooperation, the advisement of the former to the companies in matters such as learning and applying research results. The business makes an additional assertion that it cooperates in order to facilitate the professional practices of the university students. On the other hand, both sectors coincide in their indication that on few occasions they work together in patent licensing.
- There are still many factors which, by the judgement of the research groups as well as the companies, continue to make collaboration difficult between the two. The former highlight the little availability in time for this cooperation, insufficient institutional support and scant financial resources, among other things. The latter signal the unfamiliarity of the groups in order to cooperate, the little usefulness that they see in these relations, and the lack of experience of the company personnel.

Likewise, other considerations and implications for education, research and cooperation could include the following:

1. Collaboration requires mutual confidence and conviction which could prove beneficial to both parts. Obviously, legislation is needed which would make the occasion of this cooperation possible, such as an acknowledgement - by pertinent authorities- of the effort that this task requires.
2. Additionally, it would be good to create a system of incentives that would foment cooperation between both sectors (tax exemptions, remuneration...).
3. Universities and businesses should not be isolated entities but rather they should bring their efforts together and collaborate with each other, considering that the successes and failures of one sector have repercussions on the other (directly and indirectly).
4. The directors of research groups and the directors of businesses demand a more agile management which would make mutual exchange possible.

5. Both collectives also coincide in expressing a need for reliance on stable groups with regards to research cooperation, for which they demand more funding in order not to be subject to the ups and downs of the economy, and to depend solely on grants and temporary contracts.
6. In times of crisis and scant financial resources, good usage of knowledge and its profitability becomes indispensable.
7. In keeping with European and national policies, when it comes to the curricula, consideration should be given to empowering the entrepreneurial spirit, the spirit of cooperative initiative, teamwork, etc.
8. In collaborative university-business tasks, it seems fundamental that the movement of personnel between both sectors be facilitated.
9. Therefore, the creation of a collaborative culture demands the creation of spaces in which to meet, such as conferences, seminars, etc...
10. The businesses demand greater diffusion of the public assistance available in order to carry out the activities relating research and innovation.
11. For the optimisation of existing infrastructures at the universities and, if be the case, of the companies, through means of agreements for mutual collaboration.
12. The creation of databases with easy accessibility and shared usage which would allow for the exchange of information, offers, and searches for advisement, raising awareness of lines of work, etc. All of this in order to combine synergies and reduce costs.

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CHAPTER 20

THE SOCIOECONOMIC IMPACT OF A HEI FOR A LOCAL ECONOMY

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Abstract

This paper discusses the impact of Higher Education Institutions (HEIs) upon the economic development of a given region. A Portuguese Higher Education Institution - the Polytechnic Institute of Bragança (in Portuguese, IPB) - was used for that purpose as a case study. The IPB is located in the region of Bragança, an isolated and deprived region in the Northeast of Portugal.

Two approaches were followed: the demand-side approach (Caffrey & Isaacs, 1971) determines the economic impact arising from the expenditures of the IPB and its individuals; and the supply-side approach (Becker, 1993; Bluestone, 1993) measuring the creation of human capital and the enhancement in the quality of life of local individuals. Data collection included surveys on the faculty, staff, students

and graduates of the IPB; IPB's records, and other official sources. Following these two approaches, the IPB's total impact upon the region was determined, reaching 55 and 61 million euros, respectively.

The stakeholders related to the higher education institution were also taken into account. It was perceived that all stakeholders understood the importance of the institution to the region, and they were all engaged in helping to promote the region and the HEI's activities.

Keywords

Economic impact – Higher Education Institution – Human capital - Stakeholders

Introduction

Higher Education Institutions (HEIs) are institutions of great financial and social importance for the hosting regions, granting educational, economic, social and cultural opportunities that would not be there otherwise, and are thus recognized as regional development mechanisms. HEIs not only create opportunities and jobs that contribute towards the global economic activity of the region but they can also attract outside resources and investments (Carr & Roessner, 2002; Smith, 2006, Yserte & Rivera, 2010). HEIs are sources of qualified workers, with valuable competences for local employers, generating new technologies through research and development and enhancement of local quality of life through volunteer community service, among other contributions (Greenspan & Rosan, 2007).

Therefore, it is important to measure the economic impact that arises from the presence of the HEI in a given region. It estimates the additional impact that occurs above the economic activity level that would exist if the HEI would not be there. Since most of the revenues of the HEI come from outside of the region,

if the HEI did not exist, these resources would also be spent outside the local economy (Elliott et al., 1988; Jefferson College, 2003).

Yserte and Rivera (2010) argue that the impacts of HEIs in a given region can be determined through the HEI's inputs, i.e., demand-side approach, and through the HEI's outputs, i.e., supply-side approach (figure 1).

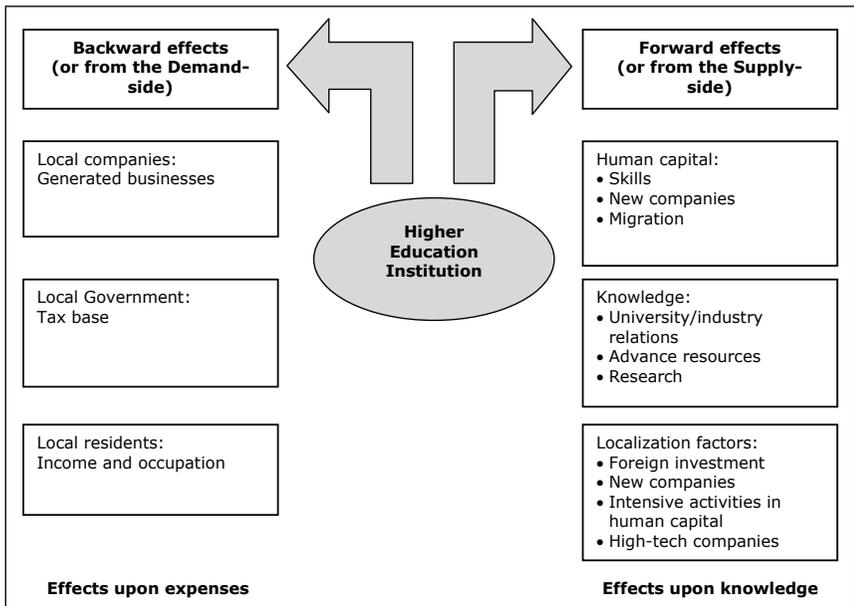


Figure 1 – The impact of Higher Education Institutions

Source: Yserte & Rivera (2010: 5).

The demand-side approach (Caffrey & Isaacs, 1971) is used to determine the impact upon local output or Gross Domestic Product (GDP) and upon jobs created which would not otherwise exist, arising from the IPB's presence and by the incomes earned and subsequently spent locally by staff and students.

The supply-side approach (Becker, 1993; Bluestone, 1993) measures the creation of human capital and the enhancement of local individuals' quality of life, through the community use of the HEI's initiatives, buildings and other facilities.

Several authors (e.g. Blackwell et al., 2002; Carr & Roessner, 2002; Lantz et al., 2002) recognize that, although usually an economic impact analysis is restricted to the demand-side, it will underestimate the real impact of the HEI in a given region.

Therefore, this paper estimates the economic impact of the Polytechnic Institute of Bragança (in Portuguese, IPB) upon the region of Bragança, a deprived region in the North of Portugal, by using both approaches. Surveys were conducted among the staff, students and graduates of the IPB, so that the total effects upon the regional GDP, upon employment, upon the enhancement of human capital and upon a range of community benefits can be estimated.

To better understand the influence of the existence of the HEI in the region it was also important to take a broader perspective and identify the different stakeholders and the relationships between them, as well as if they pursued the same goals and followed the same values and principles (Freeman, 1984).

Economic value is created by people who voluntarily come together and cooperate to improve everyone's circumstances (Freeman, Wicks & Parmar, 2004). Therefore, it is not possible to completely assess the impact upon the region without analysing how stakeholders understand the importance and the purpose of the HEI, and how the region and its individuals help and support the HEI.

The rest of the paper is organized as follows. Firstly, a brief review on the demand-side and on the supply-

side approaches is presented. Then, the analysis of the economic impact of the Polytechnic Institute of Bragança is explained. Finally, the main conclusions are drawn.

1. The demand-side approach

The demand-side approach estimates the contribution of HEIs towards local economies by measuring the effects on employment and local revenues that are created by the spending of the institution and the individuals that are directly related to it (Brown & Heaney, 1997).

Therefore, the economic impact of a given HEI results from three components: the direct, the indirect and the induced economic effects (Yserte & Rivera, 2010). The direct economic effects are the direct spending from the faculty, staff and students, and from the institution itself in the region (Elliott et al., 1988). The indirect and induced economic effects are difficult to determine and, as such, in practice a multiplier is usually applied to the direct effects in order to estimate these last two (Carr & Roessner, 2002; Elliott et al., 1988; Smith, 2006).

Most economic impact studies (e.g. Carrol & Smith, 2006; Charney & Pavlakovich-Kochi, 2003) follow the guidelines defined by the work presented in the American Council on Education (ACE) by Caffrey and Isaacs (1971). In fact, Blackwell et al. (2002) and Elliott et al. (1988) refer to this model as the base of the HEI's economic impact analysis.

1.1 The American Council on Education Model (ACE)

The ACE model estimates the impacts upon local business, local government and local individuals (figure 2). Its purpose is to identify who is spending,

how much is being spent, what goods are being bought and from where. Five sources of direct impact are considered: the institution, the faculty, the staff, the students and the visitors spending. In order to use this model, the data is mostly obtained through: surveys, the institutions' records and from other official sources.

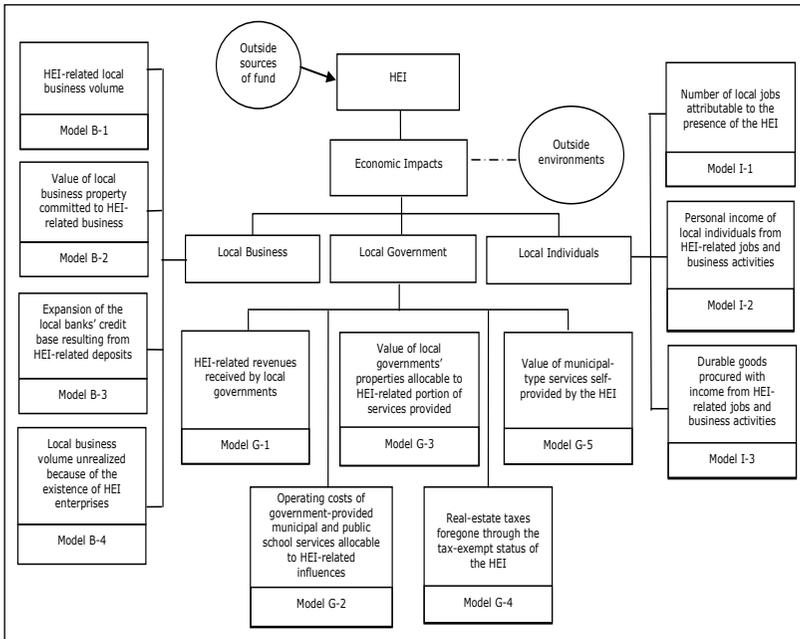


Figure 2 – The ACE Model
 Source: Adapted from Caffrey & Isaacs (1971: 10).

Due to several criticisms that the model received, the main one being its complexity, some authors (e.g. Carrol & Smith, 2006; Yserte & Rivera, 2010) used only model B-1 of figure 2. Therefore, a simpler version of the ACE model is shown on figure 3.

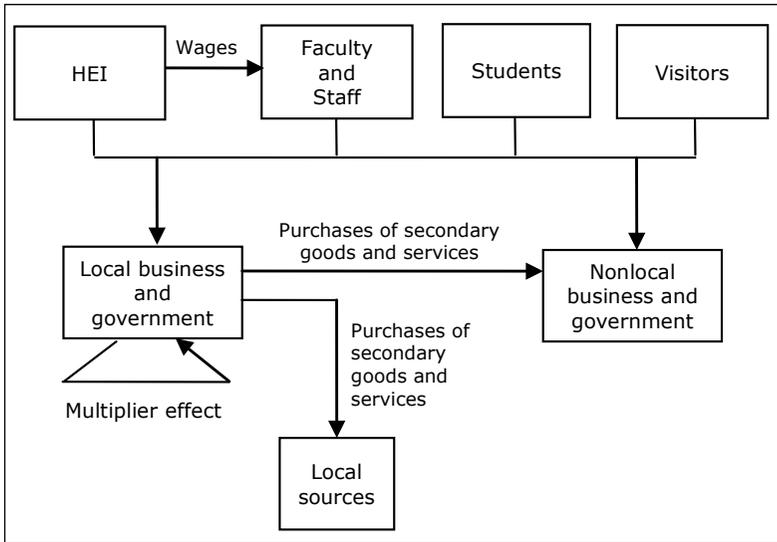


Figure 3 – The monetary flow related to the HEI that influences local business volume – Model B-1
 Source: Adapted from Caffrey & Isaacs (1971: 6).

Another criticism to the ACE model is the fact that it does not estimate long-term impacts (Brown & Heaney, 1997). Although Caffrey and Isaacs (1971) recognized the existence of those impacts, they argued that it is not possible to bring together in the same model both short-term and long-term impacts, since they have different perspectives, one being from the demand-side and the other from the supply-side.

The long-term impacts can be studied and estimated according to the supply-side approach, as described in section 2 following.

2. The supply-side approach

The supply-side approach is based on the human capital concept (Schultz, 1961; Becker, 1993), which sustains that education, due to the competences and skills acquired, increases efficiency and, therefore, lifelong income. This approach estimates the higher productivity and higher earnings that HEI graduates

benefit from (Brown & Heaney, 1997; University of Colorado, 2006).

Moreover, some authors (e.g. Baum, Ma & Payea, 2010; Blackwell et al., 2002; Desjardins, 2003) also recognize the existence of qualitative benefits, such as the correlation between higher education and better health, intellectual stimulus, higher civic participation, lower criminal rates or even decreasing smoking rates.

Although, none of these effects can be easily quantified in monetary terms, they all contribute towards the growth and economic activity of a given region. The problem with supply-side models is not so much related to the identification of the effects or their influence, but rather how to quantify them.

Therefore, although the estimates on the returns on education that focus only on wage increases are limited and most probably underestimate global returns, it is one of the more objective measures (Smith, 2006). In fact, in terms of measurement, formal school years have the strongest relative influence on economic results of the labour force and have been used as a good proxy for human capital (Becker, 1993; Desjardins, 2003).

Bluestone (1993) considered that the demand-side approach was very limited since there is an increase in skills, from attending higher education, which generates more qualified workers that earn more than they would earn had they not graduated and, as such, pay more taxes.

This method also received some criticism, because some HEIs can be tempted to use this approach to present higher economic results and, therefore, it must be conducted with caution (Carrol & Smith, 2006). Thus, to prevent inflated estimates, both

approaches are presented separately and conservative assumptions were always chosen.

2.1. The Bluestone Model

Bluestone (1993) presented a method that completes the demand-side approach, including the long-term effects arising from a more educated population.

This model attempts to estimate the regional economic activity enhancement, based on the assumption that if graduates earn more, they will also spend more and, as such, the regions will benefit from a higher business activity. On the other hand, the government will also benefit as it will receive more taxes (on income or sales). Bluestone was able to estimate the return on investment (ROI) for graduates that remain in the region and also for the government.

To determine the graduates' ROI, Bluestone estimates the difference in present value of lifelong earnings between higher education (HE) and secondary education (SE) graduates. The opportunity cost that HE graduates must bear throughout their studies (while not earning any income), as well as the costs of studying (such as tuitions, books, and others) should be included, to accurately estimate the ROI.

The government's ROI is obtained by comparing the investment the government made in the student's higher education degree, with the lifelong income and sales taxes differential between HE and SE graduates (Guichard & Larre, 2006).

3. The case of a Portuguese higher education institution

The region under study includes two towns, Bragança and Mirandela, located in the far northeast of Portugal, in a deprived and isolated area, near the border with Spain.

These towns are located in the Alto de Trás-os-Montes, with a population of 216,245 inhabitants, in 2007. Bragança has 34,489 inhabitants (the urban area has 20,309 inhabitants), geographically occupying an area of 199 km², with a purchasing power index of 100.99 (the national average index is 100.00); whereas Mirandela has 25,559 inhabitants (the urban area has 10,780 inhabitants), geographically occupying an area of 149 km², with a purchasing power index of 73.88.

The IPB has 396 faculty and 233 staff members. Its annual budget is over 20 million euros. The growth of the IPB over the years can be assessed by the increase in the number of students enrolled. It started with 110 students in the academic year of 1986/87 and reached 6,120 students in 2007/08.

3.1. The demand-side analysis

The data required to apply the ACE model was obtained from surveys to faculty, staff, students and graduates from the IPB, plus from official records. The results reflect the answers obtained from 166 responses from the faculty (42%), 105 from the staff (44%), 1343 from the students (26%) and 126 from the last 20 years' graduates (1.5%) (Fernandes, Cunha & Oliveira, 2008). The data are summarized in table 1.

Table 1 – IPB’s economic impact, according to the ACE model

Impact upon Local business	
B-1: HEI-related local business volume	54,948,182 €
B-2: Value of local business property committed to HEI-related business	3,736,476 €
B-3: Expansion of the local banks’ credit base resulting from HEI-related deposits	5,779,045 €
B-4: Local business volume unrealized because of the existence of HEI enterprises	0,0 €
Impact upon the local government	
G-1: HEI-related revenues received by local governments	241,390 €
G-2: Operating costs of government-provided municipal and public school services allocable to HEI-related influences	1,931,540 €
G-3: Value of local governments’ properties allocable to HEI-related portion of services provided	Not available
G-4: Real-estate taxes foregone through the tax-exempt status of the HEI	29,340 €
G-5: Value of municipal-type services self-provided by the HEI	294,760 €
Impact upon local individuals	
I-1: Number of local jobs attributable to the presence of the HEI	2,393
I-2: Personal income of local individuals from HEI-related jobs and business activities	30,636,970 €
I-3: Durable goods procured with income from HEI-related jobs and business activities	1,263,470 €

The IPB’s impact over local business reached 54.9 million euros; over local business property was 3.7 million euros, and the expansion of local bank’s credit base was 5.8 million euros.

The IPB’s impact upon local government, represented by the revenues the government received related to the IPB, was 241 thousand euros. Local government also had to bear certain costs due to the presence of this public HEI in the region: in operating costs, over 2.0 million euros and close to 30 thousand euros were not collected due to IPB’s tax exemption. Model G-3 could not be estimated since it was not appropriate for the Portuguese reality.

The impact of the IPB upon local individuals was estimated in almost 2,400 jobs created. The individuals earned 30.6 million euros due to activities related to the IPB and 1.3 million euros of durable goods were acquired with such income.

Overall, the economic impact estimated on the demand-side approach was, approximately 62.0 million euros. This amount represents 9.8% of the regional GDP. The number of jobs created is 7.5% of the local active population.

3.2. The supply-side analysis

The supply-side analysis begins by determining the differential in terms of earnings between HE and SE graduates and the differential in terms of taxes paid during their working life, both in present value terms. The value-base considered was the average wages in Bragança, for the year 2007, obtained through the National Institute of Statistics (table 2).

The return on investment of HE graduates was estimated by comparing the wage differential during 40 years of work, assuming that this difference is only due to different educational levels; and the cost that HE graduates have to bear during the four years degree, assuming that they will not fail any year. The cost a student will bear for attending the IPB was obtained from a survey conducted in 2007 (Fernandes, Cunha & Oliveira, 2008). Table 2 describes the results, namely the income differential through the working life, the cost of completing a HE degree and the earning differential for HE graduates, as well as the ROI.

Table 2 – Present value of lifelong net income of both educational levels

	Monthly wage ^(a)	Lifelong income (in present value)	Degree cost (in present value)	Net earnings	ROI
HE graduate	1,214.79 €	468,010 €	53,288 €	100,100 €	10.3%
SE graduate	816.61 €	314,607 €	0 €		--

(a) Available at INE (2008).

Table 2 shows that an IPB graduate will earn 153,400 € more during his working life than a SE graduate. The amount an IPB graduate spends to complete his studies was determined by considering: (a) the opportunity cost of attending the HE degree that corresponds to the loss of a SE wage every month; (b) the monthly expenses directly related to the degree, such as tuitions and books; (c) the deduction of fiscal benefits that HE graduates benefit from. The net differential between HE and SE graduates reaches 100,100 euros in 40 years of work, corresponding to an internal rate of return of 10,3%.

The return on investment for the government was determined by comparing the amount the government spent during the four years degree and the taxes it will receive during the graduates 40 years of working life.

Table 3 – Earnings and taxes paid during 40 years of working life

	Lifelong Income	Taxes paid	Tax differential	Cost per student	Government's return (2-3)	ROI
HE graduate	468,010 €	86,516 €	36,050€	13,600 €	22,450 €	9.4%
SE graduate	314,607 €	50,466 €				

Table 3 presents the lifelong income of HE and SE graduates and also the taxes both will pay. It can be seen that SE graduates will pay 36,050 euros less during their working lives. The analysis of the government's investment relates only to the tax differential. Since HE students will cost the government 13,600 euros, the government will have a net revenue of 22,450 euros. This corresponds to an internal rate of return of 9.4%.

In total, from the student's perspective, the graduates from the IPB that will remain in the region have a direct impact of 30.5 million euros (considering the 462 graduates from 2007 that will remain in Bragança according to Fernandes, Cunha & Oliveira, 2008). According to the Portuguese Central Bank, 50% of the national GDP is based on salaries and compensations, so assuming that same proportion for Portuguese municipalities, the GDP generated by the existence of the IPB reaches 61.0 million euros. This amount represents 9.7% of the regional GDP. From the government's perspective, during 40 years of work, those graduates will pay 10.4 million euros as taxes, in the region of Bragança.

3.3. The stakeholder analysis

In this study, the broad definition of stakeholder was followed, as presented by Freeman and Reed (1983). The stakeholders that were considered were: students and their families, faculty members, school staff, the institution's administration, the local community, and the local government.

The IPB presents itself as an institution concerned with the region where it is located and with the well-being of the community. Its main aim is to create qualified professionals, endowed with ethic values and high skills. It also sustains a social responsibility with the community it serves, namely by assuming that the

facilities must be available and accessible to local residents to help them launch their businesses or help them in their business activities; as well as a high concern with the population it serves by providing services (most of them for free) to enhance their health and quality of life, usually through actions implemented within the courses that are taught at the IPB. Finally, the IPB administration is also concerned with the quality of education and, for that matter, with engaging qualified staff and faculty members. Furthermore, the IPB assumes that relations with the community should be reinforced through students, staff and faculty.

Regarding the objectives and purposes of the IPB, it was perceived that they are directly influenced by the students' enrolment which in turn affects the IPB and also the faculty and staff.

During the study, it was also evident that the purposes of the IPB were aligned with those of the local government. In fact, the objective is to attract new students to the region and, perhaps even more important, to retain the highest number of graduates in the region. They all realized that local economic results were highly dependent on the existence of the IPB. Both parties argued that the high quality service provided by the IPB must be maintained; that the number of partnerships between the institution and the local government and companies must be increased; and also that the support from the local government to the institution must be maintained.

In a different perspective, it was possible to feel a lack of satisfaction from the student's side, towards the local community. They argue that the community only looks at them as the next "rent money" and do not really support their activities. On the other hand, the community feels that the students do not have a long

term perspective and, therefore, do not care about the town since they are not local, and the majority tend to go back home after graduation. As a way to reverse this behaviour, the local government provides support to students and to all of their academic activities, seeing them as part of the community and, thus, creating in them a sense of belonging.

Conclusion

Currently, it is recognized that public HEIs are not only learning, research and innovation centres, but also important development and economic growth mechanisms, being critical for the regions' future success (Charney and Pavlakovich-Kochi, 2003; Lantz et al., 2002). These institutions generate important economic benefits: for the region where they are located, through the income and jobs they create; for individuals, through higher lifelong incomes and other benefits; and for the government, through higher tax revenues.

To determine the IPB's economic impact upon the surrounding region, both the demand-side and the supply-side approaches were followed.

From the analysis undertaken, it is possible to sustain that the IPB has a major impact upon the region of Bragança. On the demand-side approach, a total economic impact of 62.0 million euros was obtained, which lead to the creation of 2,400 jobs. This approach also helped to estimate the cost the region has with the presence of the IPB, reaching 2 million euros. However, in the overall perspective, the economic activity generated by the presence of IPB represents 9.8% of the Bragança regional GDP.

Furthermore, according to the supply-side approach, the individuals that remain in the region will generate 61.0 million euros of economic activity, corresponding

to 9.7% of regional GDP and will pay back to the government 10.4 million euros, in the form of taxes.

Overall, it was possible to verify that IPB's stakeholders have the same purposes and pursue the same objectives, supporting the institution's activities and goals. These values are not conflicting and, in the stakeholders' perspective, are the only way forward to maintain and develop the region, both economically and demographically.

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CHAPTER 21

THE HIGHER EDUCATION PREMIUM AS A MEASURE OF REGIONAL DEVELOPMENT

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Abstract

Until the 1990s, studying the impacts of Higher Education Institutions (HEI) mostly focused on short-term impacts, i.e. the economic approach. In recent years, there has been a growing interest on the long-term impacts of higher education, especially concerning human capital.

The human capital analysis (Schultz, 1961; Becker, 1993) estimates the increase in productivity and incomes for individuals due to the knowledge and skills they acquired from attending a HEI. Following these authors, Bluestone (1993) suggested that the creation of human capital for higher education graduates can be estimated by assuming that wages are correlated only with the number of official school years.

In this paper, the human capital of a higher education graduate, in a deprived region of Northeast Portugal has been determined considering that the education premium is due solely to the number of years in higher education.

It was also possible to determine that the direct stakeholders, namely the government and the students, have different values and attitudes towards the higher education premium.

Keywords

Economic impact – Higher Education Institution – Human capital - Stakeholders

Introduction

Until the 1990s, studying the impacts of Higher Education Institutions (HEI) mostly focused on short term impacts, i.e. the economic approach. In recent years, there has been a growing interest on the long term impacts of Higher Education (HE), especially in what regards determining the creation of human capital.

Although several authors (e.g. Altinok, 2007; Becker, 1983; Desjardins, 2003) recognized the existence and creation of human capital on individuals that invest in a higher education, they also recognized that this impact is very difficult to quantify. Usually, whenever long term impacts were analysed, only the identification of those impacts was made and no quantification was attempted.

Following the econometric equation developed by Mincer (1958), establishing a relationship between wage variations and various factors, such as the number of official school years, family background and personal skills, other authors (e.g. Becker, 1993) have presented ways to determine this impact. Bluestone (1993) presented a more straightforward method,

suggesting that one can establish the value of human capital for the HE graduates assuming that the higher wages are correlated solely with the number of official school years. This is a simplified way to determine human capital, through its more visible form, called education premium.

In this study we determined the human capital of individuals that graduated from a Portuguese HEI, considering that the education premium (the increased wage when compared with the graduates of secondary education) is due only to the number of years they attended the institution. With this assumption, and following Bluestone's model, it was possible to determine the education premium of students that decide to obtain a higher education degree and remain in a certain region.

To deepen the analysis the stakeholders involved were also considered (Freeman & Reed, 1983: 91). Although, different stakeholders have different considerations, values or attitudes, we also distinguished between direct and indirect stakeholders. The direct stakeholders are the graduates and the government; and the indirect stakeholders are the communities where the graduates will live as well as their parents (Dick, 1997).

Therefore, first a brief review of the literature on human capital is presented; then Bluestone's model is revisited and, finally, the case of a Portuguese higher education institution is described.

1. Human Capital

The human capital theory is a concept that appeared in the 18th Century, with the basic premise that the people that constitute a given society are a form of capital in which the society can invest in the same way as they invest in physical capital (Williams & Swail,

2005). This theory was greatly developed in the 1960s by Schultz (1961) and Becker (1993).

The human capital analysis intends to determine the higher education institutions' impact under the supply-side. It calculates the increase in productivity and income for individuals due to the acquired competences, knowledge and skills from attending a HEI. Becker (1993) defined human capital as the economic effects upon jobs and income due to the investment made in education and training.

The human capital theory is concerned with the effects of education upon the overall economy, and, in particular, upon individuals' earnings. Its major constrain is the implicit assumption that education has a similar effect upon all individuals just as the money factor does. The main principle is that education increases efficiency and, as such, the lifelong incomes (Nakabashi & Figueiredo, 2008). This theory sustains that there is a correlation between human capital and economic growth, i.e. higher levels of education can bring higher earnings (Altinok, 2007; Becker, 1983; Desjardins, 2003, Monks, 2000; Perna, 2003; Sudmant, 2002). Becker (1993: 12) reinforces that "probably the most impressive piece of evidence is that more highly educated and skilled persons almost always tend to earn more than others".

Through the use of income functions, developed from Mincer's equation, there has been an attempt to determine the relationship between education and earnings, and the educations' return rate (Becker, 1993). These earnings are a measurement of the increased efficiency of the individual and, as such, of its contribution towards economic development (Williams & Swail, 2005; Strayhorn, 2005).

Although the existence of benefits from investing in human capital is largely recognized, it is still very

difficult to accurately determine the results that arise from such investment. It is possible to have an idea of the dimension of that impact by estimating the increase in regional earnings that result from higher education (Sudmant, 2002; Williams & Swail, 2005). Theoretically, earnings are determined by the individual's productivity and it is expected that differences in productivity are due to personal differences in educational investments. As such, it is expected that additional school years increase labour productivity (Jefferson College, 2003; Perna, 2003).

In terms of measurement, the average school years of the labour force has been used as a good proxy for human capital. Formal education is, from all forms of education, the one that has the strongest relative influence in the economic results (Becker, 1993; Desjardins, 2003).

Education as an investment is analysed through the relation between benefits and costs, being this relation the concept of return on investment – ROI (Clarck et al., 1998). Even though the cost of studying at a higher education level is high, the return on that investment is expected to be high enough to offset that cost (Bryant, 2001). However, those benefits can take years to actually happen after graduation. That time period is often difficult to determine and most of the studies assume that students find a job immediately after graduation, which is not supported by the data provided by the Portuguese National Statistics Institute.

The economic value of higher education is reflected on the education premium obtained by workers with a higher degree (Arizona State University, 2003). The education premium is understood as the earning differential that a graduate from a HEI earns above the earnings of a Secondary Education (SE) graduate.

Also, individuals with higher educational levels can obtain jobs faster and, as such, have more and better job experiences, have higher job stability, have more capabilities and knowledge to apply in a labour environment, are more productive and have higher wages (Bryant, 2001; Clarck et al., 1998; Thomas & Zhang, 2004).

Blackwell et al. (2002) argue that there is a shortage of data when one tries to estimate human capital, according to higher lifelong returns, specifically because they do not incorporate the innate differences of capabilities or skills that individuals have. In fact, it is likely that not all earnings associated to a higher education degree are due to education itself, but also to the innate capabilities of students (Becker, 1993; Lindahl & Regnér, 2002). However, there are still no developments in this area, and, as long as there is no evidence on which acquired skills or competences make the difference, the number of school years is still a good proxy. Therefore, a way to determine the human capital value in the market is by correlating the individuals' incomes with their level of knowledge and number of school years.

1.1 The Bluestone Model

Bluestone (1993) is referred to as the pioneer on studies about HEI's long term impacts, or supply-side impacts, in regions in which the human capital has a great importance. Bluestone's model was first developed and applied in the Boston region to estimate the impact of the Massachusetts University.

This study analysed the institution's impact according to three economic contributions to the region where it is located: "(1) the additional income that UMass/Boston students generate within the state as a result of their university education (2) the added state income and sales taxes revenues generated for the

state government as a result of the additional income earned by these students, and (3) the "export base" income and tax revenues generated from non-resident tuition, fees, and living expenses; gifts and unrestricted funds from non-Massachusetts sources; student federal grants-in-aid; non-Massachusetts sponsored grants and contracts; and federal endowment income (Bluestone, 1993: 3)."

Bluestone estimated future potential earnings of the higher education graduates that remain working in the region as a measurement of the long term economic impact of higher education.

Although there are some criticisms to Bluestone's model (such as, that it does not control the innate capabilities that workers have; that it cannot determine if a worker earns more because he has a certain level of education or simply because he is intrinsically a better worker; and also because it is necessary to guarantee that the graduates remain in the region) none of the more recent models incorporated the differences associated with individual capabilities.

The main innovation of this approach was the attempt to estimate not just the total value of the institution but the enhanced regional economic activity as a result of the educational institution's activities. Bluestone was able to estimate the human capital creation by using the wage differential as a proxy. It also determines the impact upon government revenues by comparing the amount spent by the government in financing the institutions and the amount received in the form of taxes paid, as a result of the additional income of the graduates from that HEI. If graduates earn more they will also spend more and, as such, the regions will benefit from a higher level of business activity, also benefiting the

government as it will receive more taxes (on income or sales). Bluestone (1993) determined if the government's investment in higher education has a satisfactory rate of return, by analysing the government's spending and the government's revenues in the form of taxes over income and sales.

Following the sequel, Bluestone's model is developed in two separate parts. The first concerning the students' ROI; and the second the ROI of the government.

1.1.1 Return On Investment (ROI) in the graduates' perspective

Theoretically, the rational individual compares the future earnings of his educational investment and chooses the educational program that will maximize the return of the investment (Becker, 1993).

This perspective, followed by other authors (e.g. Perna, 2003; Rubi, 1995; Strayhorn, 2005; Thomas & Zhang, 2004), estimates the difference in present value of the lifelong earnings between a higher education graduate and individuals with different educational levels. Usually the comparison is made between higher education and secondary education graduates. To accurately estimate the value, it is necessary to consider the opportunity cost that a graduate must endure during his degree, by not earning any income, and the cost of studying, such as tuitions, books, and other costs.

1.1.2 Return On Investment (ROI) in the government perspective

Bluestone's model considers another step in the determination of human capital. He considers the education premium for graduates and he also

estimates the return on investment for the government. The latter is obtained by estimating the present value of the differential in taxes received over income and sales during the working life of a HE graduate when compared with an individual with only SE. This result is then compared with the investment the government made in the higher education student throughout his degree, usually of four years, which is often determined by dividing the HEI's annual budget by the number of students. From this comparison the internal rate of return is thus obtained (Guichard & Larre, 2006; Rubi, 1995).

In the estimation of the return from taxes over income it was assumed that, if all the other conditions remain the same, those that earn more will pay more taxes (Arizona State Board of Directors for Community Colleges, 1995). In the same line of thought those that earn more will have more expenses and spend more. A simple way to estimate this is by estimating the taxes over the available income during the number of years considered.

2. The case of the Portuguese Polytechnic Institute of Bragança

According to Bluestone's model, as presented above, in order to estimate the human capital impact of an HEI in a specific region it is necessary to first establish the earning differential between HE graduates and secondary school graduates and, then, the present value of the taxes differential paid during their working life.

In order to present a clearer example of this method, a region and a HEI from the Northeast of Portugal were selected. The region was Bragança and the HEI was the Polytechnic Institute of Bragança (in Portuguese, IPB).

The value-base considered were the average wages for SE and HE degrees, in Bragança, in 2007, respectively 816.61€ and 1,214.79€, obtained from the National Statistics Institute.

2.1.1 Return On Investment (ROI) in the graduates' perspective

To determine the return on investment of HE graduates it was necessary first of all to estimate the earning premium of HE graduates. This can be done by estimating the wage differential during 40 years of labour, assuming that this differential is only due to the different educational levels. Other assumptions were made in order to allow future comparisons with other studies, such as an equal 40 year labour period and also that, in both cases, graduates will find a job as soon as they graduate, when it is known that usually there is a search period for the first job of 8 to 15 months in Portugal (table 1).

Table 1 – Present value of lifelong net income of both educational levels

	(1) Monthly wage	(2) Average monthly wage (14 months)	(3) Real update rate ^(am) (i)	(5) Update factor $\left[\frac{1 - (1 + \frac{i}{12})^{-40 \text{ years} \times 12}}{i/12} \right]$	Present value (2x5)
HE graduate	1,214.79 €	1,417.26 €	2.0%	330	468,010 €
SE graduate	816.61 €	952.71 €	2.0%	330	314,607 €

(am) Average inflation rate of 3.0%, and a nominal interest rate of 5.0% (Data available in the Portuguese Central Bank).

Table 1 describes the lifelong earnings of both educational graduates. A HE graduate will receive, during his working life, in present value, 468,000

euros; while a SE graduate will earn 314,600 euros during the same time period.

To obtain the education premium, it is necessary to estimate the costs that a HE graduate will bear during his four years of degree, assuming that he will not fail any year (table 2). All the values were based on the case of a student attending an HEI in the North of Portugal, specifically an IPB student, according to an extended survey carried out in 2007 (Fernandes, Cunha & Oliveira, 2008).

Table 2 – Cost of a higher education degree

	(1) Monthly opportunity cost	(2) Monthly expenses (except room and board)	(3) Monthly fiscal benefit	(4) Annual cost (1+2-3)	(5) Update factor $\left[\frac{1 - (1 + \frac{i}{12})^{-4 \text{ years} \times 12}}{i/12} \right]$	(6) Total cost in present value (4x5)
HE graduate	952.71 €	257 €	54 €	1.156 €	46	53,288 €

Table 2 shows that an individual that studies in a HEI for four years will spend, in present value, 53,288 euros. This calculation included: (a) the opportunity cost of attending a HE degree, corresponding to a secondary education wage that is lost every month; (b) the monthly expenses directly related with the attendance of the degree, such as tuitions and books. The expenses with room and board were excluded since a secondary education graduate will also have these expenses; (c) the fiscal benefit was deducted, since Portugal has an annual tax reimbursement policy of 645 euros per student.

The education premium, or the earning differential between a HE graduate and a SE graduate, is shown on table 3.

Table 3 – Education premium of a HE graduate

	(1) Lifelong income differential (40 years)	(2) HE cost (four years)	(3) Education Premium (1-2)
HE graduate	153,400 €	53,288 €	100,100 €

Table 3 shows that the net income differential in 40 years of working life, between a HE graduate and a SE graduate, reaches 100,100 euros, when both live in Bragança. The internal rate of return for a higher education graduate that will remain in Bragança after graduation, without considering increasing differential incomes over the years, is 10.3%.

On the stakeholders' analysis, it was possible to question the students that will graduate and obtain a higher education degree about their perception on the education premium. Students do not perceive the government contribution to their degrees as important as their families' efforts.

3.2.1 Return On Investment in the government's perspective

Previously the educational premium for HE graduates was determined. It is now necessary to determine the taxes over the additional income in order to estimate the return on investment on the government's perspective. This can be done by comparing the amount that the government spent with each student's graduation and the taxes it will receive during the graduates working life.

The application of Bluestone's vision implies that a student will take four years to graduate and will never fail any year, as such the government will bear only four years of higher education.

The income taxes paid by a HE graduate and by a SE graduate are shown in table 4.

Table 4 – Taxes paid by higher education and secondary education graduates

	(1) Average monthly Income (14 month)	(2) Tax rate	(3) Monthly tax (1x2)	(5) Update factor $\left[\frac{1 - (1 + \frac{i}{12})^{-40 \text{ years} \times 12}}{\frac{i}{12}} \right]$	(6) Taxes paid (3x5)
HE graduate	1.417,26 €	18.49%	262 €	330	86,516 €
SE graduate	952,71 €	16.04%	153 €	330	50,466 €

As can be observed in table 4, for 40 years of work, a HE graduate will pay 86,500 euros in income taxes at present value (at a tax rate of 18.48%); while a SE graduate will pay almost 50,500 euros (at a tax rate of 16.04%). The differential tax paid is, in present value terms, 36,050 euros.

Table 5 shows a summary of earnings; taxes paid, and net income of a HE graduate and a SE graduate.

Table 5 – Earnings and taxes paid during 40 years of working life

	Lifelong income	Taxes paid	Net income
HE graduate	468,010 €	86,516 €	381,500 €
SE graduate	314,607 €	50,466 €	264,140 €

The figures show that a HE graduate will receive 468,000 euros during his working life, which corresponds to 153,000 euros more than a SE graduate. However, after taxes, the income net value is 117,350 euros.

Since the government spends, during the four years of graduation 13,600 euros per student, this means that the government has a return on its investment of

21,000 euros (table 6). In fact, the government’s rate of return reaches 9.4%, which is considerably high for a public investment.

Table 6 – Return on investment

	(1) Tax paid	(2) Tax differential	(3) Cost per student	(4) Government’s return (2-3)
HE graduate	86,516 €	36,050€	13.600 €	22,450 €

Although the analysis supports that the budget granted to the HEI is an investment, due to the return rate, the government sustains that the budget is a cost it has to bear every year.

Conclusion

In the analysis of the economic impact on the supply-side, the human capital created due to the higher education obtained by Portuguese students, was estimated.

Following Bluestone’s model, it was possible to determine that the government recovers its investment during the active life of a HE graduate. In fact, the government will receive an additional income tax of 36,000 euros per HE graduate, and achieve an internal rate of return of 9.4% on its investment in education.

On the other hand, a HE graduate from the IPB can expect an education premium of 100,100 euros (64,000 euros after taxes) during his working life, when compared with a SE graduate.

The numbers of students that graduate from the IPB and remain in the region of Bragança every year must also be considered. In 2007 this number reached 462 graduates. It is possible to determine that the

graduates from just a specific year, 2007, will pay 10.4 million euros to the government as taxes, and will benefit from an education premium of 30 million euros during their active life.

Even though human capital analysis relates a given population's higher education degree with the region's economic growth, the Portuguese government goes on with its policy of continuous reduced budgets, not considering that the constraints on educational institutions will have reflections upon graduates, due to their perception of fewer resources, lower scholarships and even higher rates of dropouts, that will restrain the level of growth of the region.

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Subject Index

A

Academic achievement, 26, 195, 209, 226, 255, 324, 379, 936, 1215
Academic development
 personal and academic development, 221, 230, 234, 236, 238, 247
Academic expectations, 230, 235, 239, 240, 241
Academic identity, lv, cviii, 1203
Academic outcomes, 100, 103, 104, 105, 107, 108, 113, 117, 1248, 1316
Achievement
 differences between schools, 189, 192, 193
 grade differences, 198, 202
 in literacy, 264, 277, 280, 1167
Achievement data, 8, 11, 106, 107, 109, 790, 796, 939, 945
Achievement gaps, 4, 6, 15, 16, 19, 20, 25, 27, 28
Achievement in schools, 200, 202, 204, 206
Adult education and training, 76, 77, 1006

Adult education centres, 753, 755, 757, 761, 762, 764, 765, 768, 775, 776
Afternoon centres, 441, 450, 452, 463, 464, 468
Afterschool activities, lxxix, 438, 439, 440, 441, 1012
Alignment
 of stakeholder values, lxxix, 3
Assessment
 International, ci
Assessment frameworks, 753, 759, 760, 761, 764, 765, 767, 769, 770, 775, 776
Assessment process, 759, 762, 763, 766, 767, 769, 771, 773, 774, 817
Attitudes and Purposes of Education, xciv, 961

B

Basic education, 125, 261, 358, 916, 964
Best practices, xlvi, 800, 985, 990, 1011, 1021, 1077, 1078, 1082, 1122
Bologna Declaration, xxvi, lxxxii, 597, 615, 1033, 1034, 1048, 1049, 1053, 1057, 1058, 1145

Boys' underachievement,
13, 15, 16, 32, 34, 36,
1186, 1217, 1224, 1262
Brain drain, lxxxiii, 48,
619, 621, 622, 623,
625, 626, 629, 630,
632, 633, 635, 636,
637, 643, 1265
Break-even activity, 692
Business ethics, 876, 877,
889, 1202, 1244
Business sector, 521, 534,
536, 541, 542, 544,
545, 546, 549

C

Case studies, 75, 81, 95,
283, 378, 880, 885,
887, 940, 1116, 1125,
1126
Civil society, lxxiv, 260,
307, 701, 990, 996,
1013, 1022, 1345
Class size, xciii, 932, 955
Committed
Communication, lxxi
Community involvement,
vi, xxxviii, lxxviii, xciii,
510, 932, 934, 935,
959, 1348
Community partnerships,
226, 252, 256, 280,
1166, 1170, 1216,
1349, 1364
Community Partnerships,
401, 435, 1247, 1251,
1324, 1359
Community
representatives, lxxix,
423, 428, 430, 432

Community service, lxxx,
495, 504, 505, 507,
518, 558
Comparative studies, xcv,
256, 1089, 1216, 1298
Competition
measuring levels of,
678, 690
Competition in higher
education, 669, 671,
677, 679, 684, 685,
686, 687, 690, 691
Competition Index, 670,
679, 680, 690
Competition intensity,
674, 676, 678, 679,
680
Competitiveness
global competitiveness,
46, 531, 532, 537,
556, 679, 693, 694,
1210, 1237, 1246,
1272
Compliance standards,
xxvi, xxxix, lii, lxxxvii,
lxxxix, xc, xcii
Corporate identities, xxxi,
xci
Cultural identity, 894
Cultural Identity
affirmation of, xxxv,
xxxvii, lxxiii, lxxix
Authentic, xxi, xxii,
xxxvi
Ideal Type, xxxviii,
lxxiv, lxxvii, lxxviii
structure of, xxxiv, xxxv
Cultural patterns, 1097,
1098, 1100, 1102
Culture of the European
Commission, 602, 616,
656, 666, 1224

Culturometric
lens, c
Culturometrics, c

D

Degree courses, 834, 836,
840, 841, 843, 1036,
1049, 1056, 1058, 1339
Democratic society, 39,
124, 426, 427, 428,
880, 1091
Development
national economic
development, 685,
686, 687, 691
socioeconomic, 188,
189, 191, 195, 196,
198, 202, 203, 204,
205, 206, 209, 210,
211
Development in
Kenya, cviii, 1214
Rwanda, lxxiv, 259
Sub-Saharan Africa,
lxxxiii
Dissonance, xxiii, xxxv,
xxxvi, lix, lx, lxi, cvi,
721, 1048, 1189
Diversity
flattening out diversity,
lxix, 10, 12, 29
Dropping out
of High School, lxxiv

E

Early literacy, lxxiv, 261,
262, 263, 264, 266,
271, 272, 276
Economic conditions, xlvi,
711, 714, 719, 722

Economic efficiency, xlviii,
xciv, 681, 684, 687,
688, 690, 691
Economic impact analysis,
560, 561, 573, 592,
1144
Economic wellbeing, 1315
Education and training,
xxx, 531, 580, 694,
907, 962, 1006, 1008,
1039, 1057, 1272, 1321
Education councilors, 156,
166, 167, 172, 174,
176, 180
Education market, 669,
674, 675, 676, 677,
678, 688, 689
Education reforms, xl, lii,
66, 424, 453, 808, 941,
966, 1350
Educational changes,
lxxix, 74, 428, 433,
1332
Educational costs, 645,
651, 654, 657, 658,
659, 664, 665
Educational leadership,
lviii, 493, 786, 788,
814, 1091, 1128, 1207,
1248, 1320, 1323
Educational processes, 73,
208, 254, 379, 380,
704, 784, 853, 856,
866, 873, 922, 1210,
1211
Employee-ment, xxi, xxii,
xxv, xlvi, 27
Employment
of graduates, 854, 866
social inclusion
strategies, 1026,
1030, 1163, 1275

Empowerment, lxxvii,
374, 375, 376, 532,
720, 892, 907, 1125
Engineering students
learning styles, 867,
868
Entrepreneurial Diaspora,
39, 41, 53
Equal opportunities, lxxiii,
187, 188, 191, 209,
210, 211, 340, 1014
Erasmus Program, 598,
607, 613
Erasmus students, 613,
614
Estonia
Centre for Engineering
Pedagogy, 858, 860,
861, 868, 870, 872,
1317, 1335
European Commission,
208, 213, 526, 534,
536, 553, 554, 694,
984, 987, 990, 993,
996, 997, 1015, 1017,
1019, 1022, 1027,
1029, 1034, 1050,
1052, 1159, 1171,
1172, 1262, 1272,
1314, 1354, See also
Culture of the European
Commission
European Higher
Education, 597, 763,
777, 849, 1031, 1032,
1033, 1035, 1038,
1047, 1048, 1050,
1059, 1063, 1154,
1159, 1171, 1175,
1212, 1235, 1240, 1260

European universities,
623, 1032, 1033, 1035,
1043, 1044, 1051,
1056, 1183
Expectations
intellectual and
academic, 221, 230,
247
Expenditure on education
per student, 681, 685,
686, 691
External quality, 753, 754,
758, 759, 760, 761,
762, 776, 1342

F

Failing boys
achievement gap-talk,
lxviii
as object of policy, 3
discourse, lxi, 12, 29
in the literature, 4
Family dynamics, 221,
223, 225, 230, 233,
236, 246, 247, 248
school work, 221, 230,
247, 248
Family life, 343, 347, 352,
354, 358, 359, 360
Foreign students, lxxxiv,
609, 617, 623, 1040
Formal education, lxxiii,
xcvi, 277, 358, 1342
Fundamental values, 438,
441, 442, 443, 459,
467, 468

G

Gap-talk, xlv, 6
Gender achievement, 4, 6,
7, 12, 15, 16, 17, 19,
23

General education, 498
 Global education, lxxviii,
 3, 5, 28
 Governance
 respect for good
 governance, 990,
 1024, 1025
 Government policy, 288,
 374, 380, 645, 966
 Graduate attributes,
 lxxxiv, 695, 698, 700,
 707, 708, 1138, 1327
 Graduate teachers, 753,
 754, 755, 756, 757,
 758, 761, 763, 767,
 774, 1319, 1342
 Grandparents, lxxvii, 269,
 376, 403, 404, 405,
 406, 407, 408, 410,
 411, 412, 414, 415,
 416, 417, 418, 419,
 1197, 1265, 1306, 1310

H

High stakes testing, xxvi,
 104, 334, 1147
 Higher education
 competition, 670, 671,
 674, 689, 690, 691
 development issues,
 1350, 1351
 economic efficiency of,
 681, 684, 687, 688,
 690, 691
 in developing countries,
 625, 626
 systemic impact, lxxxiv,
 593, 671, 678, 755,
 1257
 Higher Education

European. See also
 European higher
 education
 global rankings, 616,
 645, 647, 660, 661,
 662, 663, 666, 1264
 quality assurance, 758,
 763, 777, 1058, 1171
 Home and school
 partnerships, 399
 Home-school agreements,
 283, 285, 286, 287,
 289, 290, 292, 295,
 299, 302, 303, 304,
 305, 310, 314, 317
 Homeschooled children,
 321, 322, 323, 330,
 331
 Homeschooling, 321, 323,
 326, 327, 328, 329,
 330, 331, 332, 333,
 335, 1240
 statistics, 321, 322, 323
 Human capital
 creation of, 224, 251,
 557, 560, 577, 578,
 1157
 Human resources, 92,
 523, 527, 528, 530,
 536, 552, 630, 637,
 1060, 1153, 1302, 1327
 Humanities and Social
 Sciences, 495, 496,
 502, 516, 1303, 1318,
 1320, 1331, 1332

I

Ideal child, lxxv, 438,
 441, 443, 450, 455,
 460, 467
 Inclusive education, 23,
 1066, 1084, 1297, 1349

Information Science, lxxx,
495, 496, 498, 499,
503, 507, 519, 1221,
1303, 1331
Information Technology,
lxxx, 498, 500, 505,
519, 1221, 1357
Inspection processes,
lxxxix, 128, 815, 816,
817, 818, 819, 821,
822, 823, 825, 826
Institutional Cultural
Identity
Institutional, xix
International Students, ci
International studies, 189,
192, 193, 804, 1364

J

Judicial controls, xciii,
913, 914, 918, 920,
926

K

Kindergarten teachers,
139, 141, 142, 144,
148, 451, 452
Knowledge economy,
lxxxiv, cix, 617, 620,
622, 638, 641, 643,
697, 699, 700, 703,
707, 983, 1150, 1231,
1236, 1257
Knowledge transfer, lxxx,
40, 52, 53, 54, 274,
526, 553, 1172

L

Language of instruction,
lxxxiv, 273, 275

Language revitalisation,
lxxxv, 725, 726, 729,
745, 1360
Language teaching, 739,
744, 1355
Latvia
process of
interiorization, 353,
354, 362
Learning opportunities,
79, 125, 136, 512,
1000, 1068, 1070,
1072, 1073, 1077,
1084, 1121
Learning outcomes, 131,
239, 257, 469, 858,
859, 1079, 1081, 1083,
1196, 1241
Learning processes, lxx,
60, 61, 64, 66, 70, 74,
79, 132, 239, 862, 986,
990, 993, 995, 996,
1011, 1012, 1019,
1022, 1023, 1066, 1334
Linguistic communities,
lxxxv, 403, 407, 725,
727, 734
Linguistic diversity, 727
Literacy
Emergent Literacy,
lxxiv, 259, 263
Literacy achievement. See
Achievement in literacy
Literacy development,
lxxiv, 260, 261, 262,
264, 265, 266, 268,
272, 273, 276, 277,
278, 281, 1234
Literacy education, 267,
268, 273, 275

Literacy practices, lxxiv,
264, 265, 266, 269,
274, 276, 282, 1245,
1335

Literacy skills, lxxiv, 261,
262, 267, 268, 270,
271, 272

Local authorities as
political institutions,
156, 157

Local communities, lxxx,
79, 135, 160, 957,
1000, 1002, 1003,
1008, 1105

Local government, lxxxvii,
561, 567, 570, 571,
572, 741, 1016

Local knowledge, xcix,
985, 991, 992, 993,
994

Local Networking in
Education, lxxii, 155,
162, 1340

M

Management and policy,
xxxii

Medical schools, 631, 838,
839, 840, 849, 850,
851, 1132, 1167, 1203,
1236

Milton model of language,
xxii

Minority languages, 726,
727, 731, 732, 733,
1312

Mississippi Gulf Coast
school superintendents,
482, 1316

N

National Assessments, 19,
36, 325, 939, 944,
1263

National Association of
Schools, xc, 876, 883

National education, 48,
865, 983, 1354

National policy, lxxxix,
121, 211, 807, 811,
812, 815, 823, 992

Negotiation of values, lii,
lxxvi, lxxxvii, 69, 95,
299

Neoliberal education, xxii,
xxvi, xxx, xxxvi, xxxix,
xliv, lxxxii, 7, 8, 9, 1333

Neoliberal governance, 4,
6, 28, 1032

Neoliberal policies, xxv,
xxix

Neoliberal values, lxviii,
lxxi, lxxxix

Neo-liberalism, xxvii, xli,
cx, 1252

New governance, xxvi,
938, 943, 957, 958,
990, 995, 1026, 1028,
1145, 1239

Nursery and lower primary
schools, 259, 274, 279

Nursery education, 259,
261, 263, 277

O

Ohio Department of
Education, lxxxviii, 779,
781, 782, 783, 784,
785, 786, 788, 789,
791, 793, 795, 796,
797, 798, 799, 801,
1231, 1338, 1343

Ohio Principal Evaluation System, 779, 788, 789, 791, 792, 794, 798, 801, 1231, 1343
Ontario
 Ministry of education, 4, 8, 9, 15, 23, 28, 33, 34, 1216, 1232
Organisational culture, 1090, 1095, 1097, 1098, 1099, 1100, 1101, 1102
Organizational civilization, xci, 892, 902, 908

P

Parents and teachers, lxxix, 141, 221, 225, 226, 228, 229, 230, 232, 233, 234, 236, 239, 240, 241, 242, 247, 248, 252, 271, 272, 278, 298, 391, 432, 810, 942, 1117, 1166
 statistical differences, 236, 240, 242, 243, 244, 245
Performative identity, lv
PISA, ci
Plutocracy, xxix, xlv, cviii, 1210
Policy dissent, lii
Primary education, 126, 149, 170, 188, 189, 232, 263, 267, 270, 273, 274, 277, 531, 1154, 1306
Private education, 647, 650, 652, 653, 745
Professional Development, xxxii

Professional practice, 127, 546, 547, 837
Public policies, lii, 602, 656, 915, 917, 918, 919, 920, 923, 925, 1365
Public schools, 129, 255, 330, 331, 333, 567, 788, 882, 922, 1214, 1320
Public sector, xlv, lvi, 455, 741, 745, 885, 887, 888
Punctuality and parental responsibility, 285, 306, 315

Q

Quality assurance
 internal, 753, 757, 758, 759, 765, 776
Quality teaching, 1066, 1075, 1076

R

Regional development, 210, 558, 688, 1001, 1351, 1370
Research groups
 Directors, 539, 542, 545, 549
Revitalisation
 programmes, lxxxv, 728, 729, 731, 733, 743, 745
Rights of the Child, 313, 460, 1009, 1066, 1087, 1264

Risk of dropping out,
lxxiv, 22, 221, 224,
227, 228, 230, 232,
233, 236, 238, 239,
240, 243, 244, 246,
247, 248, 1298

S

São Paulo, xciii, 913, 914,
923, 928, 929, 1180,
1221, 1236, 1238,
1252, 1255, 1317

School achievement
multi-faceted, 27

School Achievement
discourses, lxxii, 155,
1340

School boards, 11, 19, 25,
27, 61, 78, 86, 95, 936,
937, 938, 957, 958,
1330

School buildings, 60, 64,
65, 66, 68, 72, 74, 75,
77, 164, 284

School communities, 75,
76, 79, 84, 87, 91, 97,
134, 151, 300, 376,
381, 384, 397, 429,
432, 1070, 1071, 1109,
1117, 1201
members, 137, 285,
302, 306, 1117, 1123

School culture, 68, 147,
159, 434, 480, 922,
1071, 1089, 1102,
1106, 1214

School dropout
and underachievement,
155, 157, 165, 169,
183

School effectiveness, 104,
262, 279, 1127, 1139,
1304, 1337

School governance, xciii,
931, 933, 936, 937,
938, 940, 957, 1366

School Leadership, 119,
120, 319, 435, 493,
780, 782, 1065, 1086,
1087, 1128, 1177,
1193, 1207, 1226,
1228, 1230, 1238,
1272, 1316, 1320

School managers, lxxv,
283, 319, 1182

School performance, 108,
111, 114, 116, 117,
161, 844, 848, 939,
1177, 1269

School principals, 479,
1066, 1071, 1072,
1075, 1086, 1090,
1093, 1101, 1112,
1114, 1163, 1302

School readiness
practices, 121, 123,
131, 140
transition to primary,
lxxi, 121, 122, 123,
128, 146, 147, 148

School Readiness and
Transition, 121, 1312

School reform, l, lxxix,
423, 424, 428, 433,
445, 466, 941, 943,
958, 1338

School relationships, 250,
296, 302, 320, 377,
378, 381, 1131, 1216,
1266

School underachievement,
157, 162, 166, 167,
171, 173, 175, 176

- Schools
 - in highly disadvantaged contexts, 1090, 1119
- Self-evaluation, 759, 762, 766, 770, 771, 805, 829, 862, 864, 1161
- Self-government, 198, 1003, 1014, 1105, 1110, 1114, 1119, 1266
- Self-realisation, 698, 702, 703, 704, 705, 707
- Service learning, lxxx, 495, 496, 497, 499, 509, 510, 511, 512, 513, 514, 515, 516, 517, 518, 1318, 1331, 1332
- Service training, 274, 395, 398, 755, 756, 771
- Small schools, 1105, 1106, 1107, 1108, 1112, 1118, 1127
- Social capital, 224, 251, 253, 310, 697, 1103, 1123, 1157, 1194, 1310, 1317, 1360, 1361, 1366
- Social conditions, xxvii, 166, 168, 176, 350, 597, 894
- Social development, 225, 252, 256, 257, 541, 542, 1166, 1216, 1241, 1298
- Social integration, lxxvi, 317
- Social justice, 27, 156, 157, 175, 649, 918, 1093, 1103, 1353
- Social policy, 192, 211, 419, 455, 988, 1015, 1247, 1317
- Social responsibility, 510, 512, 570, 705, 833, 848
- Social support, lxxxiii, 175, 598, 599, 602, 604, 646, 649, 653, 655, 660, 664, 665, 666
- Socio economic backgrounds, 117
- Socioeconomic status, 7, 131, 194, 208, 209
- South Africa, 628, 633, 634, 635, 636, 640, 1223
- Special Education
 - in Australia, xvi, 1065, 1067, 1311
- Special educational needs (SEN), xcv, 72, 190, 1066, 1085, 1087, 1155, 1222, 1311, 1314, 1347
- Spin doctor language, xxxix
- Stakeholders
 - in education, lxxxvi, 261, 691, 692
- Stakeholders involved, 579, 670, 688, 834, 888, 962, 1025
- Standards based, 109, 116, 790
- State schools, 75, 76, 77, 222, 223, 923, 924, 1091
- Student costs, 645, 656, 663
- Student enrollment, 566, 601, 602, 609, 610, 611, 612, 613, 623, 648, 664, 834, 842

Student support, 603,
605, 663, 664
 Successful schools, 1090,
1106, 1116, 1118,
1127, 1128, 1163, 1207
 Sustainable development,
41, 44, 49, 52, 732,
907, 1345
 Sweden
 National Agency for
 Education, 438, 439,
 442, 453, 456, 457,
 458, 459, 462, 467,
 473, 474
 school inspections, 803,
 822
 Swedish schools, 469, 822

T

Teacher education
 programmes, 753, 754,
 755, 756, 757, 758,
 761, 763, 764, 765,
 767, 774, 1319, 1342
 Teacher Evaluation, 1338
 Teacher parent
 agreements, 225, 230,
 239
 Teacher training, 173,
 174, 502, 776, 855,
 866, 959, 1087, 1135,
 1177, 1216, 1222,
 1328, 1352, 1362
 Teachers' focus, 141, 142,
 144

Teaching and learning, 61,
64, 71, 72, 79, 92, 118,
137, 274, 314, 428,
432, 708, 736, 856,
940, 942, 1072, 1076,
1080, 1081, 1084,
1103, 1115, 1122,
1138, 1200, 1338, 1369
 Teaching staff, 135, 429,
430, 432, 502, 670,
753, 765, 771, 1041,
1059, 1110, 1111, 1119
 Teenagers at risk
 dropping out, 225
 Test scores, 13, 15, 16,
197, 333, 406, 427,
792, 844, 940, 950
 Traditional education, xlix,
lxxxii, 602, 1170
 Transition to primary
 school, 122, 139, 143,
 147
 Tuition fees, lxxxiii,
lxxxvii, 602, 604, 649,
652, 659, 664, 696

U

University education, 582,
1038, 1044, 1046,
1053, 1054, 1055,
1060, 1153
 Urban and rural
 differences
 achievement, 189, 192,
 193, 195, 207
 Urban schools, 429, 432,
939, 940, 941, 942,
943, 958
 Urbanization levels, 189,
191, 194, 196, 197,
199, 200, 201, 206,
207, 209, 210

V

- Value added, 43, 104, 105, 109, 935
- Values
 - of parents, lxxvii, 373, 394
 - swedish school inspection, 824
 - to be more self-sufficient, 413, 418
- Values & attitudes, lxxviii, lxxxvi, xciv, 74, 353, 403, 404, 405, 495, 496, 735, 876, 962, 976, 977, 978, 1025
- Visually impaired, xix, xx, 501, 503, 1351
- Visually Impaired Students, 501

- Vocational education, 76, 81, 82, 84, 554, 767, 857, 1008, 1172

W

- Well-being
 - community, 570
 - emotional, 350, 351
- Welsh speakers, lxxxvi, 731, 735, 740, 741, 742, 745
- Working groups, 764, 765
- World cultures, xcvi

Y

- Young children
 - prepared for employment, xlvi

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(2008) Teachers' perspectives in Portugal and recent contributions on citizenship education in *Journal of Social Science Education*, 6, (2), 73-83

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Joana Fernandes, Polytechnic Institute of Bragança, Portugal

Joana Fernandes graduated in Industrial Management and Production Engineering from the University of Beira Interior in 1998. She received the Master's degree in Industrial Engineering in 2004 and the Ph.D in Engineering Economics in 2010, both from the University of Minho. She is an Assistant Professor at the Polytechnic Institute of Bragança, since 1999.

Joana's main research work is in economic impact studies and human capital. She is currently involved in a project for the evaluation of the economic impact of Polytechnic Institutes in Portugal.

Fiona Forbes, The Australian Special Education Principals Association, Australia

Fiona Forbes has been the Principal of a special school in Western Australia for 14 years and has written on aspects of SEND (special educational needs and disabilities) and inclusion in a number of international publications. She is currently the National President of the Australian Special Education Principals Association.

Karen Freeman, Chicago State University, USA

Karen A. Freeman instructs prospective elementary teachers in introductory education classes and on methods of teaching Social Studies, Fine Arts, Humanities and Children's Literature in the Elementary School for the Department of Elementary and Middle Level Education where she was awarded the honor of Outstanding Chicago State University Faculty Member (2011). She previously held the following positions: secondary education teacher in the general and special education program; Chicago Public Schools Consultant and Coordinator for Staff Training and Development, a position which included conducting programs for parents of children with disabilities; adjunct instructor at Roosevelt University and Northwestern College in Chicago.

Dr. Freeman received her Ph.D. in 1991 from the University of Illinois at Chicago in Public Policy Analysis and Administration for Education with a Political Science minor. Her research interests include investigating family relationships and their affect on children along with visiting schools (domestically and internationally) and comparing their affect on the children serviced by them. Her publications include a joint authorship of the Teaching and Learning Materials Program Assessment Report in Ghana funded by USAID, a publication on home schooling in the United States, and publications on the childhood traits of eminent women.

Lara Fridani, Monash University, Canada

Lara Fridani is a PhD student at Monash University Australia. She works at State University of Jakarta, Indonesia, as a lecturer and a child psychologist. She supported the Indonesian government and the Board of National Education Standards in designing the Early Childhood Education Standard for Indonesia.

Lara is author or co-author of more than 20 books on childhood education and parenting in Indonesia. She is an editor of popular education books in the country and was reviewer of educational journals in her university. She is currently researching into School Readiness and Transition to Primary School. Her main interest is about child education and development.

Sylvie Gagnon, University of Canterbury, New Zealand

Sylvie Gagnon received her Ph.D in French Linguistics at Laval university, where she also taught French linguistics and French language for a number of years. She then accepted a position at the University of Canterbury, as a lecturer in French linguistics, language and culture in the School of Languages, Cultures and Linguistics. She became head of the French section in 2006 and head of the Department of European Languages since 2012.

Sylvie's research interests include European regional and minority languages, language attitudes and linguistic

policies. She has published several papers in this area of research in international journals and has been a member of the editorial advisory boards of international journals such as the Journal of the Humanities and the Journal of the Arts in Society. She was national coordinator of the French Departments in New Zealand from 2001 to 2004.

Beatriz García Antelo, University of Santiago de Compostela, Spain

Beatriz García Antelo is a professor of the Department of Educational Theory, Education History and Social Pedagogy at the University of Santiago de Compostela. She is also a member of the Scientific Council of the Institute of Education Sciences of the same university. She previously received her doctoral degree (PhD) in the Department of Research Methods and Education Diagnostic, where she also was a professor until 2010. Her current research interests include guidance processes in higher education and university collaboration with the community.

Over recent years she has participated in different research and her published work includes papers at different international meetings such as the European Conference on Educational Research or the International Conference of Education, Research and Innovation, among others. Some of her most recent publications are a book about mentoring in higher education "La tutoría en la Universidad: percepción de alumnado y profesorado" (2011) and several book chapters on innovation and collaboration between academia and industry.

The aforementioned chapters include:

"Cooperation between higher education and business: perceptions of directors of research groups in Galicia" (2010),

"La universidad y la empresa: condicionantes de la innovación y la transferencia" (2011).

Philip Garner, University of Northampton, England

Philip Garner is currently Professor of education at the University of Northampton, England. He has published extensively on teacher education and SEND (special educational needs and disabilities). Indicative examples include *Pupils with Problems* (1999, Trentham Books), *Student Teachers* (2001, David Fulton Publishers) *The Handbook of Emotional and Behavioural Difficulties* (2005, Sage), *Key Questions in Behaviour* (2007, Learning Matters) and *Fathers and Sons: in and about education* (2008, Trentham Books).

He has worked in these fields in a range of international locations (including FYR Macedonia, Malaysia, China, Finland and Australia). He taught in mainstream and special schools for 17 years, including 5 years as head of a specialist setting for young people who present challenging behaviour. He was the National Director of the Teacher Training Agency's Initial Teacher Training Professional Resource Network (IPRN) on behaviour and classroom management (*Behaviour4Learning*) and its successor, *Behaviour2Learn*, a social enterprise operating within The University of Northampton.

Philip Garner is a British Academy Fellow, the editor of *Support for Learning* and is an Expert Assessor in Education and Psychology at the European Commission's Education, Audiovisual and Culture Executive Agency (EACEA). He has acted as consultant to government education departments in Malaysia, Ireland, Croatia, Australia, FYR Macedonia and Hong Kong.

Howard Gibson, Bath Spa University, England

Howard Gibson is currently the Programme Leader for the Masters in Education Studies at Bath Spa University. He previously taught political philosophy at a number of universities, has taught in primary schools and acted as a local authority advisor for English. Dr Gibson graduated in politics from the University of Wales Aberystwyth and gained his PhD from the University of Hull. He acts as an external examiner at universities in Chelmsford, Winchester

and Birmingham and specialises in issues surrounding language and power in education as well as links between educational policy and philosophy. He has authored 45 peer-reviewed papers and book chapters and one of his latest publications has concerned instrumental rationality in educational discourses on managerialism, skills and creativity, that appeared in the Oxford Review of Education.

Howard has also written recently on the politics and ideology of economics education in schools, for the International Review of Economics Education, and on economic wellbeing in English primary schools for the Journal of Curriculum Studies. He was recently guest editor of the international journal Citizenship, Social and Economic Education with papers from leading academics in education policy from around the world, including Professor Steven J. Ball. He acts as a peer reviewer of manuscripts submitted to a number of journals including the British Journal of Education Studies. Dr Gibson has worked in universities in many countries including Spain, Estonia, the United States, Germany and Canada.

Judith A. Gouwens, Roosevelt University, USA

Judith A. Gouwens holds the position of Professor of Elementary Education in the College of Education, Roosevelt University, Chicago (Illinois, USA). She serves as Program Coordinator of Elementary Education and chair of Roosevelt University's Institutional Review Board. Previously, she was Associate Dean for Graduate Studies and Research. Dr. Gouwens has been an elementary teacher; Senior Research Associate for Research & Training Associates, Inc., Overland Park, Kansas; and Program Associate in the Center for Assessment and Evaluation at the University of Kansas, where she earned a doctorate in curriculum and instruction.

Judith served for nearly 10 years as an evaluator and expert witness of behalf of the plaintiff school children in the Jenkins et al (Kansas City) v. State of Missouri school desegregation case; has published a book about migrant education in the United States, Migrant Education: A Reference Handbook (ABC-CLIO, 2001); and currently serves as evaluator for and consultant to the Illinois Migrant

Council. Judith also authored *Education in Crisis: A Reference Handbook* (ABC-CLIO, 2009). After Hurricane Katrina, Gouwens led teams of Roosevelt University students to provide hurricane relief to the Bay Saint Louis-Waveland (Mississippi) School District, the impetus for studying the leadership of Mississippi Gulf Coast school superintendents.

Camilla Highfield, The University of Auckland, New Zealand

Camilla Highfield is the Director of Professional Learning and Development at the Faculty of Education, The University of Auckland. She is nearing the completion of her doctoral research on the impact of middle leadership on secondary student outcomes. Camilla is an emerging academic having previously been a teacher and official at the Ministry of Education in New Zealand.

Camilla has given papers at conferences focused on schooling improvement and has had a journal article published in *School Leadership and Management*. Camilla's professional interests are in supporting school leaders and teachers to improve the academic outcomes for students who are not served well by the current education system.

Soudabeh Jalili, Islamic Azad University, Tehran, Iran

Soudabeh Jalili is a Faculty Member of Department of MANAGEMENT, West Tehran Branch, Islamic Azad University (IAU), Tehran, Iran, and also teaches management courses there. She Works in Hamshahri Newspaper Company as consultant of CEO. She is Executive Directorin at Iranian Journal of Public Administration Mission publishes in IAU, Tehran, Iran. She previously taught management courses at Parand Branch, Central Tehran Branch and Electronic center of IAU (2009-2012). She was a fellow of thought room of Military Service and also a fellow of research committee of Expediency (2011).

Soudabeh received her M.A in Public Administration from IAU central Tehran branch, Iran (2008); she is studying PhD in Public Administration (Policy Making) at science and

research branch of IAU, Tehran, Iran. She works on Human Resource Management (HRM) and Policy Making. She is author or co-author of more than 9 Journal articles and conference papers on HRM and Policy Making. Her most influential publication is *Organizational Civilization for 2nd Paris International Conference on Education, Economy & Society, 2010*. She presented paper of the influence of emotional intelligence, social capital & HR development on efficiency of Hamshahri CO. for national conference in Ali Abad Katool, 2009. She presented entrepreneurship and administration entrepreneurship in a 2011 national conference.

Joana Marques, University Institute of Lisbon (CIES-IUL), Portugal

Joana Marques is researcher at the Centre for Research and Studies in Sociology of the University Institute of Lisbon (CIES-IUL) and PhD student in Sociology at the Faculty of Philosophy, Languages and Literature, and Human Sciences of the University of São Paulo (FFLCH-USP). Her research fields include social policy, education, school architecture, social participation and solidarity economy.

Joana has also worked for a number of years in the field of African studies and she earned an award for her master thesis on solidarity economy (ISCTE-IUL, 2010). She has conducted research work in Portugal, Norway, Cape Verde, Sao Tome and Brazil.

In addition to a number of papers on solidarity economy, Joana has co-edited a book on community development, tourism, environment and education in Sao Tome and Principe (Gerpress, 2009).

Hants Kipper, Tallinn University of Technology, Estonia

Tiia Rütman is associate professor and head of Estonian Centre for Engineering Pedagogy at Tallinn University of Technology, Estonia. Tiia Rütman received her Ph.D. in education at University of Hradec Kralove, Czech Republic in 2007. She graduated Tallinn University of Technology as an engineer of chemical technology in 1982 and received her

MSc in chemical engineering in 1992. She is teaching Engineering Pedagogy Science, Laboratory Didactics and Methodology, Methodology and Didactics of Teaching Engineering and coordinates teaching practice. She became a member of International Society for Engineering Education IGIP in 2003 and received qualification of International Engineering Educator ING.PAED.IGIP in 2004. She is author or co-author of more than 40 peer-reviewed journal articles. Her recent publications are on effective teaching of engineering.

Tiia is also author of the book of Engineering Pedagogy Science (forthcoming). She has been active in IGIP since 2003 and serves as member of IGIP Executive Committee and as Secretary general of IGIP Estonian Monitoring Committee. She is the member of editorial board of IGIP-IEEE peer-reviewed online journal (iJEP) "International Journal of Engineering Pedagogy" and of International Scientific Journal "Technology of Education" since 2011. She has been a visiting professor at Slovak University of Technology in Bratislava.

Sanja Kisicek, University of Zagreb, Croatia

Sanja Kišiček is a research assistant at the Department of Information Sciences, Faculty of Humanities and Social Sciences, University of Zagreb, Croatia. She is enrolled in the postgraduate study of Information Sciences and she conducts research for her PhD thesis in the field of learning styles and virtual multimedia learning. She is engaged in teaching in the area of computer assisted teaching and multimedia. She has worked on several service learning projects throughout her career. She published 6 book chapters, 7 papers, held workshops and attended many international conferences in the field of e-learning, multimedia and service learning.

Sanja's most important publications include:

Service learning in Zagreb University: how far have we gone? (Matić, Mikelić Preradović, Boras, 2008),

Project of developing the multimedia software supporting teaching (Matić, Lauc, Mikelić Preradović, 2007),

Framework of the Language Learning Environment for Assisting Foreigners in Learning Croatian (Posavec, Mikelić Preradović, Kišiček, 2011).

She also received the Sience Award in 2008 from Croatian National Science Foundation for the paper Educational multimedia software for English language.

Damjan Lajh, Educational Research Institute, Ljubljana, Slovenia

Damjan Lajh is an associate professor at the Faculty of Social Sciences, University of Ljubljana, Slovenia, and a researcher at the Centre for Political Science Research at the same faculty. His research interests include EU policy-making processes, especially the implementation of EU cohesion policy, Europeanisation processes in Slovenia, and processes of democratic transition, especially in the post-Yugoslav region.

Damjan is the author or co-author of five books and many articles published in scientific journals, such as *West European Politics*, *Journal of Communist Studies and Transition Politics*, *Journal of Southern Europe and the Balkans*, *Perspectives: The Central European Review of International Affairs*, *Mezinarodni vztahy (International Relations)*, *Politologicky časopis (Journal of Political Science)*, *Politička misao (Political Thought)*, *Teorija in praksa (Theory and Practice)*, and *Politics in Central Europe*.

Floris Lammens, Royal Conservatoire Antwerp, Belgium

Floris Lammens coordinates student counselling at the Royal Conservatoire Antwerp. Prior to joining the Conservatoire, he worked for the Flemish Council of University Colleges (VLHORA) as staff member quality assurance and the Flemish Students Union VVS. He holds a master's degree in music (violin) from the Royal Conservatoire Antwerp. He is a trained EFQM-assessor. As a VLHORA staff member he developed together with Pieter-Jan Van de Velde the framework for the external assessment of the Flemish post graduate teacher education programmes.

Donna Lander, Jackson State University, USA

Donna Lander is Pre-Service Coordinator for the Mississippi Academy for Science Teaching at Jackson State University, Jackson, Mississippi (USA), and program evaluator for the Winona (Mississippi) Public School District. At Jackson State University, Dr. Lander has served as Coordinator of the Ph.D. program in Educational Leadership and Assistant Professor of Educational Foundations and Leadership. She has been a public school teacher, a guidance counselor, a school and school district level administrator, Director of Instructional Services in the Mississippi Department of Education, and Senior Research Associate for Research & Training Associates, Inc. in Overland Park, Kansas. Dr. Lander earned a doctoral degree in educational leadership at the University of Minnesota. Her areas of expertise include school finance, educational policy, research analysis, technical writing, and program evaluation. After Hurricane Katrina, Dr. Lander began interviewing school superintendents whose school districts were devastated by the hurricane about the districts' recovery efforts. From those interviews, Lander authored, with Judith Gouwens, "School Leadership In Changing Cultural Contexts: How Mississippi Superintendents are Responding to Hurricane Katrina" in the *Journal of Education for Students Placed at Risk* (2008).

Armando Loureiro, University of Trás-os-Montes and Alto Douro, Portugal

Armando Loureiro is Assistant Professor of adult education, and sociology of education in the University of Trás-os-Montes and Alto Douro - Department of Education and Psychology. He is vice president of the School of Humanities and Social Sciences and member of the Directive Committee of the PhD in Education Sciences in the same University. He is a researcher at the Centre of Education Research (CIIE), University of Porto. He is visiting professor in the UNIMONTES University (Brasil).

He graduated in sociology in Beira Interior University. He obtained a master degree in local development in University of Trás-os-Montes and Alto Douro. He received his PhD in sociology of education in the same University.

He works on adult education, sociology of education and professional knowledge. He is author or co-author of ten chapters in books, three books and more of fifteen peer-reviewed journal articles in these areas.

Luísa Veloso, University Institute of Lisbon (CIES-IUL), Portugal

Luísa Veloso is since 2008 a senior researcher at the Centre for Research and Studies in Sociology of the University Institute of Lisbon (CIES-IUL). She also teaches presently some classes at Master courses of the University Institute of Lisbon. She is an associated part-time researcher at the Institute of Sociology of the Faculty of Arts of the University of Porto.

She previously taught various sociology issues at the Faculty of Arts of the University of Porto, mainly at the graduated and post-graduate degrees in Sociology, but also at other graduate, as European Studies. (1991-2008).

Luísa Veloso is graduated (1990) and did her PhD in Sociology (2004) and her Master Degree on Human Resources Management (1995). Her main research areas are sociology of education and training and sociology of work and professions and labour market.

She is author and co-author of some dozens of peer-reviewed journal articles, abstracts, book reviews, book chapters, invited papers and books. Some of her most recent publications include book chapters and journal articles on Youth and precarious employment in Europe (2011) and Evaluation in education and social actors' participation (2011; 2012). She published works on labour market and professions and professional identities (Ashgate, 2011, *Mundos Sociais*, 2010, *Afrontamento*, 2009 and *Estratégias Criativas*, 2009).

She is member of the Editorial Board of the Portuguese Journal of Social Sciences, Member of the Head Commission of the Research stream Work, Organisations and Professions of the Portuguese Sociological Association, co-coordinator of

the research stream Work, Innovation and Social Structures of the Economy of CIES-IUL.

Luísa Veloso won the 3rd prize of a Contest of Ideas "Transitions in the Ave Valley, an Industrial Region" (2008).

She is a member of the "Observatory of Activities of Africa and Latin America" of the Calouste Gulbenkian Foundation (since 2011) and has been participating in various international research projects on education, training and labour market, like "Follow-up of the Copenhagen process: research into forms of individual career development and continuing vocational training" (2009).

Antonio Luzón, University of Granada, Granada

Antonio Luzón, is associate professor of Comparative Education at the University of Granada, teaches international and comparative education with a focus on European educational systems. As member of the Research Group "Educational Policies and Reforms" of the regional government of Andalusia (Spain), from which he has participated in national and international projects of research, linked to the educational policies and reforms.

Among Antonio's most recent works are:

"Verso una democrazia creativa. Il significato di democrazia e educazione in John Dewey", in Gramigna, A. (Ed.), *Democrazia dell'educazione. Saggi su Chomsky, Dewey, Foucault, Freire, Gadamer, Habermas, Levinas, Ricoeur, Savater, Maturana e Varela* (Milano: Unicopli, 2010);

with M. Pereyra, J.C. González Faraco & M. Torres, "Social Change and Configurations of Rhetoric: Schooling and Social Exclusion-Inclusion in Educational Reform in Contemporary Spain", in R. Cowen & A. Kazamias (Eds.), *International Handbook of Comparative Education* (Dordrecht: Springer, 2009);

with J.C. González Faraco, "Éducation et autonomie regionale en Espagne", *Revue Internationale d'Éducation* (2010, 51: 41-48);

and Mónica Torres, "Visualizing PISA Scientific Literature versus PISA Public Usage", in M.A. Pereyra, H-G. Kotthoff & R. Cowen, *PISA under Examination. Changing Knowledge, Changing Tests, and Changing Schools* (Rotterdam: Sense Publishers, 2011).

Joanna Madalińska-Michalak, University of Lodz, Poland

Joanna Madalińska-Michalak: Department of Didactics and Teacher Education, Faculty of Educational Studies, University of Lodz, Poland

Joanna Madalińska-Michalak, is Professor and Chair of the Department of Didactics and Teacher Education at the Faculty of Educational Studies, University of Lodz, Poland. Joanna has been working at the University of Lodz since 1996. She has long-standing research interests in comparative education, teacher education research, policy of teacher education, teacher's professional development and learning, exemplary teachers and leaders, teacher's success and its conditions, educational leadership, ethics and professionalism of teaching.

At the present time she is developing her research interests around the quality of teacher education, the quality of the relationships in educational settings, school development and school leadership and management, and the school-university partnership.

Joanna is author of 11 books and author or co-author of more than 150 peer-review journal articles and book chapters. Her recent publications include:

Michalak, J.M., Kwiatkowski, S.M., Nowosad, I. (eds). (2011). *Przywódcztwo w szkole i jej otoczeniu* [Leadership at school and its surroundings]. Wydawnictwo Difin, Warsaw;

Michalak, J. M., Kwiatkowski, S. M. (Eds.) (2010). *Przywódcztwo edukacyjne w teorii i praktyce* [Educational Leadership in Theory and Practice]. Fundacja Rozwoju Systemu Edukacji, Warsaw;

Michalak, J. M. (ed.) (2010) *Etyka i profesjonalizm w zawodzie nauczyciela* [Ethics and professionalism in teaching]. Wydawnictwo Uniwersytetu Łódzkiego, Lodz.

Professor Madalińska-Michalak has been active in Polskie Towarzystwo Pedagogiczne (Polish Pedagogics Association) and served as a member of Executive Body in 2007-2011. Now she is Vice-President of Polskie Towarzystwo Pedagogiczne (Polish Pedagogics Association). She has served as a Member of Council Board of European Educational Research Association since 2008. She has taught at many universities in Europe: Sheffield Hallam University, University of Aveiro, Valencia University, University of Latvia, University of Tallin, State College of Teacher Education in Linz and Akdeniz University.

Raquel-Amaya Martínez-González, Oviedo University, Spain

Dr. Raquel-Amaya Martínez-González is Professor of Education at Oviedo University (Spain). She is the coordinator of both the research team on "Socio-Educative Assessment and Intervention in Families, Schools and Communities" and the "Observatory on Family-School-Social Agents Partnerships", both at Oviedo University, Spain. She was Visiting Fellow at the Australian Institute of Family Studies in Melbourne. As an expert external evaluator, she reviews education research projects for the Spanish National Agency of Evaluation and Prospective. Also as Expert in Emotional Intelligence and Positive Parenting she was invited by the Council of Europe in Strasbourg and by the Spanish Social Services Ministry to present her research findings in international meetings and conferences.

She received the Spanish National Research Award in Education and the "José Lorca" Award (Asturias, Spain) for her work on promoting children's rights. Her research findings on Family-School-Community Partnerships have been published in international books, journals and conferences proceedings in the U.S. and Europe. Dr. Martínez-González translated educational documents into Spanish edited by the International Academy of Education and the United Nations Educational, Scientific, and Cultural Organization. She was President of the European Research

Network About Parents in Education (ERNAPE) and currently she is member of Council of the European Education Research Association (EERA), representing the Spanish Educational Research Association (AIDIPE).

Wayne J. Martino, University of Western Ontario, Canada

Wayne J. Martino, Ph.D., is Professor of Education in the Faculty of Education at The University of Western Ontario, Canada. Previously, he taught in the School of Education at Murdoch University, Perth Western Australia. His research interests are in the fields of gender equity, boys' education, masculinities and schooling, queer studies in education, minority underachievement, and critical policy sociology. He has published in a range of international refereed journals such as American Educational Research Journal, The British Journal of the Sociology of Education, Cambridge Journal of Education, Gender and Education and International Journal of Qualitative Studies in Education, and serves on the Editorial Boards of the Journal of Men and Masculinities and the Journal of LGBT Youth in the United States and Educational Review in the United Kingdom.

Wayne's books include: *So What's a Boy? Addressing Issues of Masculinity and Schooling* (with Maria Pallotta-Chiarolli, Open University Press, 2003), *'Being Normal is the Only Way To Be': Adolescent Perspectives on Gender and School* (with Maria Pallotta-Chiarolli, University of New South Wales Press, 2005), *Gendered Outcasts and Sexual Outlaws* (with Christopher Kendall, Routledge, 2006) and *Gender, Race and the Politics of Role Modelling* (with Goli Rezai-Rashti, Routledge New York, 2012).

Dace Medne, Jāzep's Vītol's Latvian Academy of Music, Latvia

Dace Medne is a lecturer at Jāzep's Vītol's Latvian Academy of Music and Head of the social care division at Social Care Centre for Children „Pļavnieki”, Rīga. She has a doctor's degree in pedagogy (DR.paed.) and a bachelor's degree psychologist.

Dace has 16 publications. She is the author of a chapter in the research paper *Society, Integration, Education - Proceedings of the International Scientific Conference, volume I Traditions as Upbringing method in Modern Latvian Families.* - Rezekne: Rezekne Higher Education Institution (RHEI), (2001), 695: 437. - 445. (available at www.isiwebofknowledge.com). She has written a chapter in the research paper *A Child in school Setting - Life Scenarios of Hyperactive Children at School. 1 (1).* - Torun: Uniwersytet Zielonogórski and Wydawnictwo Adam Marszałek. (2011) 335: 296-311., ISBN 978-83-7611-906-9.

Dace received a grant from European Social Fund in 2009/2010 for the ESF project „Atbalsts doktora studijām Latvijas Universitātē” (Support for Doctoral Studies at University of Latvia) and has authored the two books *Medne Dace is the author of Dzirdēt ar sirdi (Hear with the heart).* - (2010), Rīga. ISBN 978-9984-49-010-6 and *Kā strādāt ar hiperaktīviem bērniem (How to work with hyperactive children).* - (2007), Rīga: RaKa. ISBN 978-9984-15-857-8 as well as many other research papers.

Her Research interests include Family Upbringing in the Transformative Society of Latvia and Hyperactive Children's Life Scenario.

Golamreza Memarzadeh Tehran, Islamic Azad University, Tehran, Iran

Dr. G. Memarzadeh Tehran has been with the school of Economics and Management, Islamic Azad University for more than 20 years and has dedicated his career to instructing students mostly at graduate level. Other than these activities, he is currently serving as the head of department of public administration and co-director of Economics & Management School. He earned a Ph.D degree in the field of Public Administration, that he has published several peer-reviewed journal and conference papers. He is also the author and co-authors of 5 books with a focus in Comparative Public Administration, Strategic Management, and Organizational Behavior. His expertise and persistency have led him to be nominated for many prestigious awards.

Many of his students have taken key careers in many public and private organizations, caused him be a well-known professor to discuss with where people seeking long and short terms remedies for their problem. Beyond his main activities, he is also editor of two highly ranked journals (editor@bioinfo & editor@ijmbr).

Charles E. Mitchell, Troy University, USA

Charles E. Mitchell teaches ethics and human resources management in the Department of Public Administration, Troy University, where he is assistant professor of public administration. He received his Ph.D. from the University of Georgia. Previous employment was with the United States Equal Employment Opportunity Commission as Enforcement Supervisor, District Training Officer and Staff Consultant. His research specializes in equal employment opportunity law. He is author of peer-reviewed journals articles which appear in the labor law journal, public personnel management journal, review of public personnel administration and academic conference proceedings. An upcoming publication, "An Analysis of the Supreme Court case in Ricci Et Al. v DeStefano, Et Al: The New Haven Firefighters Case" addresses the controversial and competing issues of disparate impact v disparate treatment theories found in Title VII of the Civil Rights Act of 1964, as amended.

Charles has also authored "Violating The Public Trust: The Ethical and Moral Obligations of Public Officials (1999) which explores flaws in (a) ethical decision making of government officials and (b) ethic's teaching methodologies. Active in the American Society for Public Administration (ASPA) he has served as president of the North Georgia Chapter of ASPA.

James Moir, University of Abertay Dundee, Scotland

Dr James Moir is a senior lecturer in sociology at the University of Abertay Dundee (Scotland, U.K.) with a research interest the higher education policy discourses of personal development planning and graduate attributes, and their translation into curricular reform. He has served

as a Senior Associate of the U.K. Higher Education Academy's Centre for Sociology, Anthropology and Politics (C-SAP) as well as being a lead consultant for Quality Assurance Agency's (Scotland) Enhancement Themes projects: "Graduates for the 21st Century" and "Developing and Supporting the Curriculum".

Pedro Oliveira, ICBAS, University of Porto, Portugal

Pedro Oliveira graduated in Chemical Engineering from the University of Porto, Portugal, in 1984, the MPhil in Statistics from the University of Minho, Braga, Portugal, in 1988 and the PhD in Applied Mathematics from Strathclyde University, Glasgow, UK, in 1992.

Pedro has been associate Professor at the University of Porto since 2010, formerly at the University of Minho. His main research work is in statistics and optimization. He is currently involved in a project for the evaluation of the economic impact of Polytechnic Institutes in Portugal.

Tomás Patrocínio, Universidade de Lisboa, Instituto de Educação

Tomás Patrocínio is invited assistant professor at Institute of Education of the University of Lisbon where he teaches in the under and postgraduate programs. He received his PhD on Education and Development from the New University of Lisbon, Portugal, 2005. He received his degree in Economy from the Technical University of Lisbon, 1978. His current research interests are on Policies of Education and Technologies in Education and he is a member of the Unit for Educational Research and Training in the Institute of Education, University of Lisbon. He owns a diversified experience in the education area as he has worked as teacher of basic and secondary education, as chair of a teacher training centre, as coordinator of national projects in the Ministry of Education. He has also worked as head of external relations at the rectorate of the University of Lisbon for seven years.

Tomás has attended a large number of congress and seminars in the country and worldwide, organized by

universities or other educational institutions in which he has made numerous presentations.

He is author or co-author of more than 75 peer-reviewed journal articles, abstracts, book chapters and invited papers. He is author of a book on Technology, Education and Citizenship.

Miguel A. Pereyra, University of Granada, Granada

Miguel A. Pereyra is full professor of Comparative Education at the University of Granada, and President of CESE. Trained both as an educationist and an historian, concluded his tertiary studies on history & comparative education at Columbia University and its Teachers College, and his research and publications are focused on comparative & cultural history of education, and educational reforms and educational policies.

Miguel's most recent publications in English include the edition of *Changing Knowledge and Education (Communities, Mobilities and New Policies in Global Societies* (Frankfurt: Peter Lang Verlag, 2008), "Social Change and Configurations of Rhetoric: Schooling and Social Exclusion-Inclusion in Educational Reform in Contemporary Spain" (with J.C. González Faraco, A. Luzón & M. Torres), in *International Handbook of Comparative Education*, edited by R. Cowen and A. Kazamias (Dordrecht: Springer, 2009), the edition of a volume on the German debate about PISA (with H.-G. Kotthoff): *La experiencia del PISA en Alemania* appeared in the electronic journal *Profesorado. Revista de currículum y formación del profesorado* (vol. 13-2, 2009: <http://www.ugr.es/~recfpro/?p=435>), and the edition (with H-G. Kotthoff & R. Cowen) of *PISA under Examination. Changing Knowledge, Changing Tests, and Changing Schools* (Rotterdam: Sense Publishers, 2011).

Ma Henar Pérez-Herrero, Oviedo University, Spain

María del Henar Pérez Herrero is Assistant Professor at the Department of Education at Oviedo University (Spain), where she is involved in Research Methodology, Practicum and

Learning Difficulties lectures. She is a member of both the research team on 'Socio-Educative Assessment and Intervention in Families, Schools and Communities' and the 'Observatory on Family-School-Community Partnership', at Oviedo University.

María has worked as psychologist and pedagogue in multi-professional community teams assisting schools to create partnerships with parents. She facilitates programmes on Emotional Intelligence for families, teachers and community professionals, especially in the fields of health and social services. She has published research papers in international journals and presented at scientific meetings in the US and Europe.

Ann S. Pihlgren, Stockholm University, Sweden

Ann S. Pihlgren, PhD, researcher and educator at Stockholm University has worked as supervisor, principal, teacher, and chairman of the political school board in the Swedish school system. She is involved in several projects concerning school development, pedagogical improvement, and leadership training. Her doctoral dissertation "Socrates in the Classroom" was a thorough investigation of the Socratic traditions in education, and a phenomenological analysis of the interplay of children philosophizing as part of their classroom syllabus. It was awarded "Swedish dissertation of the year" 2008. Ann has also received the Swedish award for enhancing school democracy. Her literary book production includes: "Socratic Dialogue in Education", "Democratic Educational Methods", and "The Thinking Classroom". She is the editor of the anthology "The Leisure-time Center" and has also participated in: "Leisure-time Pedagogy", "Educational Assessment", "Dewey Read Today", "Knowledge, Communication, and Assessment in Education", etc.

Ann's research interests concern thinking, cooperative learning, democratic education, and consequences in teaching. Ann is a frequent lecturer in the USA and cooperates with a research group affiliated to the University of North Carolina. She is involved in a long term school development project in Slovakia, and has cooperated with

universities in Belgium, Norway, other European countries, and in Iran.

Some of Ann's relevant articles and books are:

Pihlgren, A. S. (ed.) (2011).). Fritidshemmet - fritidslärarens uppdrag på fritidshemmet och i skolan. Lund: Studentlitteratur.[Pihlgren, A. S. (ed.) (2011).). The leisure - leisure teacher assignments in kindergarten and at school. Lund: University Press.]

Pihlgren, A. S. (2004). Dagens skola skapar morgondagens samhälle. In S. Hartman, (ed.), Dewey läst idag. GEM rapport 3 edn. Stockholm: Lärarhögskolan i Stockholm, pp. 115 - 142. [Pihlgren, A. S. (2004). Today's school creates tomorrow's society. In S. Hartman (ed.), Dewey read today. GEM report 3 edn. Stockholm: Stockholm Institute of Education, pp. 115-142.]

Pihlgren, A. S. (2012). Demokratiska arbetsformer - värdegrundsarbete i skolan. Lund: Studentlitteratur. [Pihlgren, A. S. (2012). Democratic work - values work in school. Lund: University Press.]

José Portela, University of Trás-os-Montes, Portugal

José Portela is an Associate Professor of Rural Sociology, University of Trás-os-Montes and Alto Douro, Vila Real, Portugal. In December 2004, José Portela was elected Director of CETRAD, Center for Transdisciplinary Studies for Development, University of Tras-os-Montes and Alto Douro

Nives Mikelic Preradovic, University of Zagreb, Croatia

Mikelic Preradovic is assistant professor at the Department of Information and Communication Sciences, Faculty of Humanities and Social Sciences, University of Zagreb. She received her PhD in Information Science at the same university in 2008 and her MPhil in Computer Speech, Text and Internet Technology at University of Cambridge, UK, in 2004. Her research specializes in Natural Language Processing and Service Learning (Community-based Learning). She mentored and administrated over 50 service learning projects over the last 4 years. She received JFDP

scholarship grant (Junior Faculty Development Program, funded by the U.S. Department of State's Bureau of Educational and Cultural Affairs) in 2005/2006, and Cambridge Overseas Trust scholarship grant from the University of Cambridge in 2003/2004. She also received Rector's Award for student paper in 2001.

She is author or coauthor of more than 30 peerreviewed journal articles, book chapters and invited papers.

Her most influential publication is *Approaches to the Development of the Machine Lexicon for Croatian Language*, PhD Thesis, 2008.

In addition to a number of articles on service learning, Nives has authored the coursebook (in Croatian): *Learning for the Knowledge Society: service learning theory and practice* (Office of Information Studies, Faculty of Humanities and Social Sciences 2009).

Martin Retzl, University of Vienna, Austria

Martin Retzl is senior research and project assistant in the Department of Education at the University of Vienna, and is currently completing his doctoral thesis on the role of democracy in educational change and education policy. He holds a Master's degree in Education from the University of Vienna, as well as a Diploma in Education for teaching at secondary school. Co-Editor of "PISA According to PISA", a critical international anthology on PISA, his work on PISA and democratic school improvement has appeared in various German-language publications and has been presented at international conferences in Europe and the U.S. His research interests include education policy, governance in education, educational change and school improvement.

Goli Rezai-Rashti, University of Western Ontario, Canada

Goli M. Rezai-Rashti is Professor of Education at the University of Western Ontario. Her research interests are broadly in the field of sociology of education, critical policy and postcolonial studies. She has published numerous

papers and book chapters which deal specifically with issues related to gender, race, class, sexuality and schooling and also the impact of neoliberal education reform on Canadian education. Her recent research has focused on a critique of male teachers as role models and women and higher education in Iran. Dr. Rezai-Rashti's research has been published in scholarly journals such as the *American Education Research Journal*, *Gender and Education*, *Discourse: Studies in the Cultural Politics of Education*, *Curriculum Inquiry* and *Critique: Critical Middle Eastern Studies*. She has published over 15 book chapters and her recent book (with Professor Martino) on *Gender, Race, and the Politics of Role Modelling: The Influence of Male Teachers* has been published in 2012.

Martino, W., & Rezai-Rashti, G. *Gender, Race, and the Politics of Role Modelling: The Influence of Male Teachers*. Routledge Research in Education. Routledge, Taylor & Francis Group. 7625 Empire Drive, Florence, KY 41042.

Valdis Rocens

Valdis Rocens is assistant professor and project director at the Turība University. He teaches strategic management and business forecasting, his field of research is economics of higher education with a specialisation in competition among universities and in education efficiency. He has reported on the research results at the conferences in Bulgaria, France, Latvia, Portugal and Slovenia and presented lectures as a visiting lecturer in the University of Wismar, Germany, at the end of 2010. Valdis Rocens is currently in the promotion process to receive a doctoral degree in Management from University of Latvia

Malin Rohlin, Stockholm University, Sweden

Malin Rohlin received her Ph.D in pedagogic at Stockholm University 2001, worked with a number of years constructing the higher education for leisure-pedagogue or school-age education-care teachers at The Stockholm Institute of Education and at the University. At the present she is Head of the Department of Arts and Professions at Stockholm University. Previously she was the vice chairman for the board of education at Stockholm University. Dr. Rohlin's thesis

‘Governing in the name of children’s leisure time: A contemporary history of the construction of today’s school-age childcare (fritidshem) in coordination with the school’ problematizes children’s time; time that must be organized and regulated. Her research field concern leisure time and steering of education, learning processes and methods, placed within an academic environment and with a multimodal approach. She is author and co-author of several articles and books about steering of the leisure time.

Two of her most relevant publications are:

The problematic time in "The Future Is Not What It Appears To Be". *Pedagogy, Genealogy and Political Epistemologi*. Popkewitz, T, Petersson K, Olsson U & Kowalczyk J (eds.) HLS förlag, Stockholms univeristet, *and* *Fritidspedagogik och lärande in "Fritidshemmet"* (ed. A. S. Pihlgren). Lund: Studentlitteratur 2011.[Leisure Education and Learning in "leisure-time" (ed. AS Pihlgren). Lund: Student Reading 2011]

José Roberto Rus Perez, Universidade Estadual de Campinas – UNICAMP, Brazil

José Roberto Rus Perez is a livre-docente professor in the Faculty of Education at Universidade Estadual de Campinas – UNICAMP – Brazil and researcher of the Center for Public Policies Studies- NEPP/UNICAMP. He received his PhD in Education in Faculty of Education at UNICAMP in 1994 and conducted post-doctoral research at The University of Texas at Austin in 2003. His research focuses on Social Policy and Educational Policy, with special attention to the basic and secondary education. He is author of the book *Avaliação, Impasses e Desafios da Educação Básica* (Editora da Unicamp and Annablume, 2000) and co-author of the book *Construindo a Ouvidoria no Brasil* (Editora da Unicamp, 2011).

José’s recent articles include:

“Social policies for children and adolescents in Brazil” in *Cadernos de Pesquisa*, 2010, *and*

“Is important analyze implementation of educational policies nowadays?” in *Educação & Sociedade*, 2010.

Pierre Canisius Ruterana, National University of Rwanda

Pierre Canisius RUTERANA has been a qualified translator lecturing in Translation and Interpreting in the Department of Modern Languages, Faculty of Arts, Media and Social Sciences at the National University of Rwanda since 2001. He is currently pursuing a PhD in Education (Behavioural Sciences and Learning) at Linköping University in Sweden since 2007 with a research focus on the development of a reading culture and literacy in Rwanda.

Pierre's major publications include:

Trilingual Glossary French- English- Kinyarwanda for Primary Schools in Rwanda (2010);

Exploring home literacy practices among Rwandan families published in the International Journal of Research in Education, 3(1); Children's Literature in Rwanda: Translating Fairy Tales (2012);

Children's Reflections on Gender Equality in Fairy Tales: A Rwanda Case Study (2012) published in The Journal of Pan African Studies, 4(9), pp. 85-101.

Tiia Rüttnann, Tallinn University of Technology, Estonia

Hants Kipper is a lecturer at Estonian Centre for Engineering Pedagogy at Tallinn University of Technology, Estonia. Hants Kipper received his MA in education in 2009 at Tallinn University of Technology, Estonia. He has graduated Tallinn University of Technology as an electrical engineer in 1975. He is teaching Engineering Pedagogy Science, Laboratory Didactics and Methodology, Didactics and Methodology of Teaching Engineering, and Mentoring. Hants Kipper coordinates teaching practice at Tallinn University of Technology. He became a member of International Society for Engineering Education IGIP in 2009 and received the qualification of International Engineering Educator ING.PAED.IGIP in 2009.

Hants Kipper is the author or co-author of more than 20 peer-reviewed journal articles. His recent publications are on effective teaching of engineering. He is co-author of the

book of Engineering Pedagogy Science (forthcoming). Hants has also been active in IGIP and has served as a member of IGIP International Monitoring Committee since 2011.

Alan R. Sadovnik, Rutgers University, Newark, USA

Alan R. Sadovnik is Board of Governors Distinguished Service Professor of Education, Sociology and Public Administration and Affairs at Rutgers University, Newark, New Jersey, where he is the Co-Director of the Institute on Educational Law and Policy and the Newark Schools Research Collaborative, and Coordinator of the Educational Policy track of the Ph.D. Program in Urban Systems. He received his B.A. in sociology from Queens College of the City University of New York and M.A. and Ph.D. in sociology from New York University.

Among Alan's notable publications are:

Equity and Excellence in Higher Education (1995);
Exploring Education: An Introduction to the Foundations of Education (1994, 2001, 2006, 2013);

Knowledge and Pedagogy: The Sociology of Basil Bernstein (1995),
Sociology of Education: A Critical Reader (2007, 2010);

"Schools of Tomorrow," Schools of Today: What Happened to Progressive Education (1999),
Founding Mothers and Others:

Women Educational Leaders During the Progressive Era (2002),

Alan has also published dozens of journal articles and book chapters as well as ten major urban educational policy reports. Among the awards he has received are the American Sociological Association's Willard Waller Award for the outstanding article in the sociology of education; and three American Educational Association Critics Choice Awards for an outstanding book in the field.

Marija Sakic, Institute of Social Sciences Ivo Pilar, Zagreb, Croatia

Marija Sakic is a senior research assistant at the Ivo Pilar Institute of Social Sciences, Zagreb, Croatia. She is also a teaching assistant in developmental psychology courses at the Department of Psychology, Centre for Croatian Studies at the University of Zagreb. She graduated in Psychology in 2002 at the Centre for Croatian Studies and received her PhD in cognitive sciences at the University of Zagreb in 2010. Her main research interests are in the field of developmental and educational psychology.

Marija is the co-author of 20 peer-reviewed scientific papers, book chapters, conference abstracts and proceedings. Her main publications are related to the determinants of school achievement and school effectiveness, coauthored with Josip Burusic and Toni Babarovic, and entitled: "Experimental External Evaluation of Educational Objectives in Croatian Primary Schools", "Determinants of School Effectiveness in Primary Schools in the Republic of Croatia: Results of an Empirical Investigation". She is also a member of the Croatian Psychological Chamber, the Croatian Society for Neuroscience, the Croatian Pedagogical – Literary Society, and the International Society for the Study of Behavioural Development (ISSBD).

João Sebastião, University Institute of Lisbon (CIES-IUL), Portugal

João Sebastião is Auxiliary Professor, at the University Institute of Lisbon. Researcher at the Centre for Research and Studies in Sociology of the University Institute of Lisbon (CIES-IUL). Major interests of research are social inequalities in education, school violence and youth marginality. Has published several books and articles about these themes both in Portuguese and international journals.

Christina Segerholm, MidSweden University, Sweden

Christina Segerholm is professor in education at MidSweden University. She teaches graduate and undergraduate

courses in several areas in education. Segerholm's main research interests are education policy, educational evaluation and its impact on education policy and practice. Currently she is engaged in the international project *Governing by inspection: school inspection in England, Scotland and Sweden* lead by professor Jenny Ozga. Apart from publishing articles about the governing power of evaluation in education, she was one of the editors of the book *Fabricating Quality in Education. Data and governance in Europe* published in 2011, a book that critically analyses quality assurance and evaluation as a governing device and as a Europeanising force.

Patricia A. Shaw, University of Wisconsin-Stevens Point, USA

Patricia A. Shaw is a professor and Head of the School of Education at the University of Wisconsin-Stevens Point (UWSP). She also serves as an Associate Dean of the College of Professional Studies at UWSP. Dr. Shaw earned her PhD in Continuing and Vocational Education, with a minor in Educational Leadership, at the University of Wisconsin-Madison. Her research interests include: women educational leaders and power, and teaching and learning in the online environment. Dr. Shaw has given presentations in the United States, Canada, and France.

Patricia's service work includes advising the UWSP chapter of Kappa Delta Pi International Society in Education and serving as the president of the Tomorrow River Scholarship Foundation, Amherst, Wisconsin.

Lisa Shoaf, John Carroll University – Cleveland, Ohio, USA

Lisa Shoaf is a charter member of the Ohio Council of Professors of Educational Administration, and she served as its President from 2010 to 2011. She is currently working with the Ohio Department of Education to help train Ohio principals how to enact the new Ohio Teacher Evaluation System, as well as being a key member of the Ohio Board of Regents' "Blue Ribbon Panel" for the improvement of principal preparation programs in the state. Dr. Shoaf has conducted research and written about school reform and

change including, "Advantages and Disadvantages of an Online Charter School for The American Journal of Distance Education, and "The Hidden Advantages of Focus Group Interviews in Educational Research" published in the Journal of School Public Relations. Lisa was a co-author on a recent article, "State Initiatives for Principal Accountability in Ohio (U.S)," which appeared in the Proceedings of the 2011 Paris International Conference on Education, Economy and Society. Lisa is the Chair of the Department of Educational Leadership at John Carroll University, in Cleveland, Ohio. Lisa was also a school administrator prior to moving to John Carroll University.

Anna Siri, University of Genoa, Italy

Anna Siri received her Ph.D. in evaluation of educational processes and systems at University of Genoa (Italy), worked for a number of years as didactic manager of Healthcare degree courses, and is now the executive director of the Medical Education Centre at University of Genoa. Her research focuses on policy implementation, educational reform, and accountability.

Anna's areas of specialization include university choice, student persistence, and enrolment management. She is author or co-author of more than 30 peer-reviewed journal articles, abstracts, and book chapters. She is past associate editor of Journal of the World Universities Forum (2011).

Florbela Sousa, University of Lisbon, Portugal

Florbela Sousa, PhD, is Assistant Professor at the University of Lisbon, Institute of Education, Her research interests include educational policies, school administration and leadership, and citizenship education. She is the supervisor of Master's and Doctoral theses in those areas.

She has taught as a visiting Professor at the University of Granada from 2004 to 2011. She is Co-coordinator of a UNESCO Chair on Gender Equality and Women's Empowerment for the University of Lisbon (2009-2012) as well as the National Coordinator of CICE (Children Identity and Citizenship in Europe - an Erasmus Academic Network). She is a team member and consultant in national and

European projects. She is an expert consultant for MIPEx (Migrant Integration Policy Index). She is a co-leader of the project "Building Local Networking in Education? Decision-Makers Discourses on School Achievement and Drop out in Portugal", a three year (2010-2013) financed project by the FCT (Science and Technology Foundation) with a national dimension.

Florbela is also a team member in "ECLIPSE" (European Citizenship - Learning in a Programme for Secondary Education), a European Comenius project on Citizenship Education. She has published her research in English, Spanish and Portuguese.

Ana Elisa Spaolonzi Queiroz Assis, Universidade Estadual de Campinas – UNICAMP, Brazil

Ana Elisa Spaolonzi Queiroz Assis is a PhD student at Universidade Estadual de Campinas – Unicamp – Brazil and researcher of the Laboratory of Public Policy and Educational Planning in Education Faculty - UNICAMP and also a researcher of the Laboratory of Technical Networks and Environmental Sustainability – FLUXUS in the Faculty of Engineering, Architecture and Urbanism of UNICAMP.

Ana has a graduation degree in Education (2004) and Law (2009) schools, and received her master's degree in Education in 2007, all features at PUC-Campinas – Brazil. Her research in both laboratories is focuses on Social Policies and sciences dialogues. She is a co-author of three books: Manual de Sociologia Geral e Jurídica (Lex Editora, 2010); História da Cultura Jurídica: o direito na Grécia (Gen Editora, 2010); and Noções Gerais de Direito e Formação Humanística (Saraiva, 2012), all dealing with the relationship between law and society. She has presented many papers related on her research at international conferences in Brazil, Argentina, Cuba, France and Portugal.

Urška Štremfel, Educational Research Institute, Ljubljana, Slovenia

Urška Štremfel is a research assistant at the Educational Research Institute in Ljubljana and a part time research assistant at the Centre for Political Science Research at the

Faculty of Social Sciences, University of Ljubljana. Her research interests include the European aspects of policy analysis, especially new modes of EU governance and cooperation in the field of education policy. Her bibliography is composed of research on open method of coordination, large scale student assessments and multicultural education. She is co-author of two books and articles published in scientific journals, such as *Sociologicky časopis* (Czech Sociological Review), *Journal of Comparative Politics*, and *Šolsko polje* (The School Field).

At the moment Urška is preparing her PhD thesis with the working title "New Modes of Governance in the European Union in the Field of Education Policy".

Mónica Torres, University of Granada, Granada

Mónica Torres is assistant professor in the Department of Pedagogy at University of Granada. She teaches international and comparative education, with a focus on European educational systems. As member of the Research Group "Educational Policies and Reforms", of the regional government of Andalusia (Spain), has participated in national and international projects of research related to educational policies and reforms.

Among Mónica's most recent works are:

"From Centralism to Decentralization. The Recent Transformation of the Spanish Education System" (*European Education*, 2005, 37 1);

with M. Pereyra, J.C. González Faraco & A. Luzón, "Social Change and Configurations of Rhetoric: Schooling and Social Exclusion-Inclusion in Educational Reform in Contemporary Spain", in *International Handbook of Comparative Education*, edited by R. Cowen and A. Kazamias (Dordrecht: Springer, 2009);

with Antonio Luzón, "*La Educación Internacional, un nuevo escenario entre naciones desde una política global*", in *Educación Internacional*, (Valencia: Tirant Lo Blanch, 2009), [International Education, a new scenario between nations in a global policy] *and*

with J. Luengo & A. Luzón, "*Las reformas educativas basadas en el enfoque por competencias: una visión comparada*", in Profesorado. Revista de Currículum y Formación del Profesorado (2008, vol. 12-3: [The educational reforms based on the skills approach: a comparative view] <http://www.ugr.es/~recfpro/rev123ed.pdf>); and

with Antonio Luzón and Mónica Torres, "*Visualizing PISA Scientific Literature versus PISA Public Usage*", in M.A. Pereyra, H-G. Kotthoff & R. Cowen, *PISA under Examination. Changing Knowledge, Changing Tests, and Changing Schools* (Rotterdam: Sense Publishers, 2011).

Pieter-Jan Van de Velde, Flemish Interuniversity Council (VLIR), Belgium

Pieter-Jan Van de Velde is staff member quality assurance at the Flemish Interuniversity Council (VLIR) and coordinates external assessments of university programmes and post graduate teacher education programmes. Prior to joining VLIR, he was active in student movement as Ghent University board member and active member of the Flemish Students Union VVS and the Flemish Educational Council VLOR. Recently, he has assisted the European Youth Forum in developing a new external quality assurance approach for non-formal education in the youth sector. He holds a master's degree in economics and development studies from Ghent University and a degree in Sociology from the Université Libre de Bruxelles. As VLIR staff member Pieter-Jan Van de Velde currently coordinates the external assessment of all 38 post-graduate teacher education programmes in Flanders.

Ted Zigler, Wright State University – Dayton, Ohio, USA

Ted A. Zigler received his doctorate in Educational Administration from the University of Cincinnati in 1992. He was named the Ohio Principal of the Year in 2001, and received UCEA's Excellence in Educational Leadership Award in 2000. Ted was a member of the Writing Team for the Ohio Principal Standards, adopted in 2005, served on the Ohio Standards Alignment committee, which developed a crosswalk to align the Ohio Standards with the ISLLC, ELCC,

and NCATE standards for institutions of higher education, and the Writing Team with the Ohio Department of Education to develop a template for principal evaluation, based on the new Ohio Principal Standards. At Ohio Dominican University, Dr. Zigler directed the Teacher Leader grant, developing Teacher Leader Standards for Ohio along with designing the pilot for the Teacher Leader Endorsement at ODU. He is also involved in the development of a Principal Licensure Program at ODU, the Master of Education in Educational Leadership. Starting at Wright State University in November 2011, Ted will continue his work with the Ohio Principal Evaluation System for ODE, as well as working with the principal and superintendent organizations.

Introductions to our Associate Editors

Dzintra Atstaja, Banku Augstskola School of Business and Finance, Riga, Latvia

Dzintra Atstaja is an Associate Professor at the Department of Entrepreneurship and IT at BA School of Business and Finance (Latvia), Doctor of Social Sciences in Economy, Management Science (Entrepreneurship Management). She is also the Head of the Technogenic Environmental Safety Research Laboratory and Senior Researcher of the Institute of Occupational Safety and Civil Defense at Riga Technical University, Faculty of Engineering Economics and Management. She specialises in economics and sustainable development, e-learning, environmental management, civil defense and work safety and has more than twenty years experience in business consulting.

D. Atstaja is a founder and board member of the Latvian Association of Economics and member of the European Society for the History of Economic Thought and SMART civil society organisation.

Dzintra is author or coauthor of more than 50 papers and books. Here publications can be found in the Library of Congress, USA e.g. Monograph "Environment and Economics" (in Latvian) and "Environment and Sustainable Development" and in scientific journals and in electronic data bases.

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Khachatur Avalyan, Prime Minister's office, Government of the Republic of Armenia

Khachatur Avalyan commenced his work with the Prime Minister's office in September 2008. His primary responsibility was to assess existing business plans within the private sector and provide selected projects with government support. In addition, Khachatur has been

selected to represent the Armenian government as a member of the Board of Directors for the "South-Caucasus Railway" Joint-Stock Company.

Richard B. Baldauf, Jr., School of Education, University of Queensland, Australia.

Richard B. Baldauf, Jr. is Professor of TESOL at the School of Education at the University of Queensland, Australia. He is Executive Editor of Current Issues in Language Planning, has published numerous articles in refereed journals and books. Richard has co-authored:

Language Planning from Practice to Theory (1997),

Language and Language-in-Education Planning in the Pacific Basin (2003), and

Planning Chinese Characters: Evolution, Revolution or Reaction (2008).

M. J. Best, Edgewood College, Madison, Wisconsin USA

M. J. Best, Ph.D is Assistant professor of education and coordinator for the higher education concentration of the Ed.D. program at Edgewood College in Madison Wisconsin USA.

He has over fifteen years of state level leadership experience in education agencies that are charged to oversee PK-12 education, teacher and administrator training and technical college programs. In that capacity he has successfully implemented several statewide education initiatives. Currently in addition to coordinating a growing doctoral program, he teaches the leadership course, and has taught the curriculum course in the doctoral program sequence for higher education leaders. He is also consulting with five Wisconsin high schools in an effort to bring industry skills into the academic curriculum.

***Joseph Marr Cronin, Boston University,
Massachusetts, USA***

Joseph Marr Cronin, Lecturer, Boston University, was formerly professor at Harvard University. He is the author of two publications focusing on the role of city mayors in school decision-making: *The Control of Urban Schools* (1973) and *Reforming Boston schools, 1930s to the Present*.

Joseph is a Senior Consultant for Edvisors. Edvisors works with colleges, universities, foundations, states, corporations and other agencies that seek to make changes or expand in providing services. One important core value is the extension of educational opportunities to individuals and groups who may previously been denied access to education, the arts or the world of learning.

***John Dwyfor Davies, Department of Education,
University of the West of England, Bristol,
England***

John Dwyfor Davies has taught pupils across the primary and secondary age range and was a headteacher of a residential school for pupils with social, emotional and behavioural difficulties before moving into higher education as a senior lecturer at Oxford Brooks University. He later joined the University of the West of England as a principal lecturer and head of Special Educational Needs and subsequently, Professor of Education at the University of the West of England, Bristol where he now is an Emeritus Professor in the Department of Education.

John has researched and published widely and acted as a consultant on special educational needs and school leadership in many areas of the world.

***Kevin Davison School of Education, Australian
Catholic University, Melbourne, Australia***

Dr. Kevin Davison is a Senior Lecturer with the School of Education at the Australian Catholic University in Melbourne, Australia [as of 2 July 2012]. He is on leave from his post as Lecturer in Education with the School of Education at The National University of Ireland, Galway, Ireland. He

researches, publishes and teaches in the following areas: sociology of education, gender and education, boys and academic underachievement; male teachers as role models, images and teaching, and science outreach.

In addition to his peer-reviewed publications, Kevin is also the author of:

Negotiating masculinities and bodies in schools: The implications for gender theory for the education of boys (2007, Edwin Mellen Press) and,

with Blye Frank, Masculinities and schooling: Challenging international practices and perspectives (2007, Althouse Press).

***Rollande Deslandes, Department of Education,
Université du Québec, Trois-Rivières, Québec,
Canada***

Rollande Deslandes is a full tenure Professor in the Department of Education at the Université du Québec à Trois-Rivières, Québec (Canada). She obtained a Bachelor Degree in Education (Home Economics and Biology) at McGill University in Montreal, a Master's Degree in Social Work and a doctorate in Educational Psychology at Laval University, in Québec city. She is Director of the Education, Culture and Health: Interactions and Partnerships Research Laboratory in Trois-Rivières. She received a Research Excellence award from the University in 2004. Her research interests include family and community involvement in schooling in relation to students' achievement, development and healthy habits.

Rollande has been involved with the American Educational Research Association (AERA) Family-School-Community Partnership Sig, the European Research Network of Parents in Education (ERNAPE) and the Association Internationale en Éducation Familiale (AIFREF) for over a decade. She has published in several Anglophone and Francophone scientific journals. She edited the following two important volumes:

(1) Deslandes, R. (2009 Ed). International perspectives on student outcomes and homework : Family-school-community partnerships. New York and London: Routledge.

(2) Deslandes, R. (2009 Ed) International perspectives on contexts, communities and evaluated innovative practices. New York and London: Routledge.

***Dana Dobrovská, Czech Technical University,
Prague, Czech Republic***

Dana Dobrovská, works at the dep. of engineering pedagogy, Masaryk Institute of Advanced Studies, Czech Technical University in Prague, Kolejní 2a, 160 00 Prague 6, Czech Republic.

***Gerardo Echeita, Faculty of Education and
Teacher Education, Autonomous University of
Madrid (UAM), Spain***

Gerardo Echeita is Senior Lecturer at Faculty of Education and Teacher Education, Autonomous University of Madrid (UAM) Spain. Expert in the evaluation of policies and practices about inclusive education. Favorite work is "Educación Inclusiva. Voz y quebranto" ("Inclusive education. Voice and suffering") at REICE - Revista Electrónica Iberoamericana sobre Calidad, Eficacia y Cambio en Educación 2008, 6, (2).

<http://www.rinace.net/arts/vol6num2/art1.pdf>

***Anthony Feiler, Special Educational Needs,
University of Bristol, England***

Dr. Anthony Feiler is Reader in Education, Special Educational Needs at the University of Bristol. Before university teaching, Anthony Feiler was a teacher and a senior educational psychologist. His current teaching and research focus on special and inclusive education, and on links between schools and parents. Anthony has received awards for conducting research from the British Academy, the Esmée Fairbairn Foundation, the Department for Children Schools and Families and the Qualifications and Curriculum and Development Authority.

Anthony is a member of the ESRC Peer Review College; and his book *Engaging 'Hard to Reach' Parents* (Wiley-Blackwell, 2010) was shortlisted for the National Association of Special Educational Needs Academic Book Award 2011

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Daniel Friedrich is Assistant Professor in the Dept. of Curriculum and Teaching at Teachers College, Columbia University. Prof. Friedrich is currently interested in the system of thought behind the travelling of teacher education reforms around the world. He has published articles in *Discourse: Studies in the Cultural Politics of Education* and the *Journal of Curriculum Theorizing* among others. His book *'The Limits of Democratic Education as a Curricular Problem'* will be available in 2013.

Friedrich, D. S. (2013). *The Limits of Democratic Education As a Curricular Problem*. Routledge.

Gallego Carmen Vega, University of Sevilla, Spain

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After elected positions in the European Students Union (ESU), in which he represented the organisation within the Bologna Process and contributed to the development of the European Standards and Guidelines of Quality Assurance, Nik worked as project leader with Dutch Quality Assurance agency QANU; was manager higher education projects, of Dutch development organisation SPARK (formerly ATA), and most recently the Head of sparqs (student participation in quality Scotland). Alongside these positions, he has also been involved with numerous organisations as a consultant and researcher in higher education development.

Currently, Nik works as a researcher for the Combined Universities in Cornwall (CUC) and is undertaking PhD research at the University of Exeter in the United Kingdom. His research interests are in the strategies of Universities in the context of knowledge-based regional development and in Quality Assurance of higher education. Nik is also member of the Quality Assurance Board of the Flemish Universities and University Colleges Council (VLUHR).

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Professor Garry Hornby first worked for four months as a residential social worker in a school for emotionally disturbed and intellectually disabled children in the USA. He then taught physics for one year in England before moving to Auckland where he taught maths and physics and worked with slow learners at Aorere College for two and a half years.

After that Garry taught a special class of children with moderate learning difficulties for three years at Tamaki College. He worked for seven years in Auckland as an educational psychologist in pre-school, primary and secondary schools. He then lectured in special education at Auckland Teachers' College for two years, and set up a one year full-time training course for teachers of the visually impaired. After that he worked at Manchester University as a researcher on children with Down's syndrome and their parents for fifteen months. Then lectured at Hull University

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In 1997 and 1998 Garry worked in Barbados as a government consultant on special education for two years setting up a range of levels of teacher training for special needs. He then worked as Director of Research in the Education Department at Hull University for two years, before being appointed as Professor of Education at UC where he has been for ten years.

Garry is married to a teacher and they have two teenage sons. A recent book is:

Hornby, G. (2011). *Parental Involvement in Childhood Education: Building Effective School-Family Partnerships*. New York: Springer.

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Mieke's work has been published in journals such as the *Journal of Curriculum Studies*, *Journal of Educational Research*, *School Effectiveness and School Improvement*, *Sociology of Education*, *American Educational Research Journal*, *Oxford Review of Education*, *Acta Sociologica*, etc.

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in these areas including her recently completed 3rd edition of *Stretching Exercises for Qualitative Researchers* (2011) which is reorganized around habits of mind and includes new sections on internet inquiry and constructing poetry from interview data.

Valerie uses dance and the arts as a metaphor for understanding research, evaluation and assessment. Her book, *Oral History Methods for the Qualitative Researcher: Choreographing the Story* (2010) Guilford Publications, argues for artistic representations of data and oral history as a social justice project.

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Abubakar Kateregga has also published various Rwandan folktales in English (MK. Publishers, Kampala) and in French (Harmattan, Paris).

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Her recent publications include:

Klemencic, E. (2010). The impact of international achievement studies on national education policymaking : the case of Slovenia - how many watches do we need?. In A. Wiseman (Ed.) The impact of international achievement studies on national education policymaking (pp. 239-266). International perspectives on education and society, 13. Bingley: Emerald.

Her work on research project management includes:

Government Communication Office: »EU v šolah« (EU in schools); conducted by the Educational Research Institute (year 2011-2012).

European Commission and national Ministry of Education project: Implementation of National Lifelong Learning Strategies within the Policy Framework "Education & Training 2010"; conducted by the Educational Research Institute and Ministry of Education and Sport (year 2009)

GDNET (SAR): Basic Education Quality Assurance Systems in South Eastern Europe: What Works in Our Region? (expert for Slovenia; year 2010 - 2012)

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Zvezdana Prizmic Larsen received her Ph.D in psychology from the University of Zagreb in 2000. She is currently a research scientist at the Washington University in St. Louis and served as a research associate at the Institute of Social Science 'Ivo Pilar' in Zagreb, Croatia (1991-2001). Her publications have a strong focus on work satisfaction and quality of life.

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Scarino, A. and A.J. Liddicoat (2009) *Teaching and Learning Languages: A Guide*. Melbourne: Curriculum Corporation. www.tllg.edu.au

Liddicoat, A.J. (2008) *Discourse, Genre and Rhetoric: The French Verb in Research Writing in Science and Technology*. Lincom Europa, Munich. ssl.kundenserver.de

Liddicoat, A.J. (2007) *Introduction to Conversation Analysis*. Continuum: London.

Liddicoat, A.J. and A. Scarino (eds) (2010) *Languages in Australian Education: Problems, Prospects and Future Directions*. Newcastle-on-Tyne: Cambridge Scholars. www.c-s-p.org

Liddicoat, A.J. and R.B Baldauf (eds) (2008) *Language Planning in Local Contexts*. Multilingual Matters, Clevedon. www.multilingual-matters.com

Liddicoat, A.J. (2009) Evolving ideologies of the intercultural in *Australian multicultural and language education policy Journal of Multilingual and Multicultural Development* 31,3: 189-203.

Liddicoat, A.J. (2009) Communication as a culturally contexted practice: A view from intercultural communication. *Australian Journal of Linguistics* 29,1:115-133.

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Kustec Lipicer, S. & McCardle, D. (2012), National law, domestic governance and global policy: a case study of anti-doping policy in Slovenia. *Int. j. sport policy*,

Kustec Lipicer, S. (2008). The worth of policy knowledge in younger democracies; reflections and perspectives. *Anali Hrvat. politol. druš., 2008, god. 5*, str. 187-209

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Dr. Margaret Lloyd, an Associate Professor in the Faculty of Education at QUT in Brisbane (Australia), is a nationally recognised award-winning tertiary educator, author, presenter and curriculum designer in the field of ICT education. She is currently a leader in the national Teaching Teachers to the Future Project (AUD\$8.8 million), which is aiming to increase the ICT pedagogy skills of pre-service teachers in all Australian Teacher Education Institutions.

Along with teaching and supervising doctoral students, she co-edits the Journal of Learning Design [<http://www.jld.qut.edu.au>] and directs the oz-Teachernet [<http://www.otn.edu.au>], a long running professional community for teachers which began in 1995. She is the President of QSITE, Queensland Society for Information Technology in Education [<http://www.qsite.edu.au>] and is a member of the Board of the Australian Council for Computers in Education [<http://www.acce.edu.au>].

Her current research is concerned with the Technology Education in North Norway project funded by the Norwegian Research Council and involving academics from both Finnmark University College and NTNU. Further to this, she is a Founding Member of the Children and Youth Research Centre based at the Queensland University of Technology.

Please visit <http://staff.qut.edu.au/staff/lloydmm> for more biographical information or

http://eprints.qut.edu.au/view/person/Lloyd,_Margaret.html for access to some of her publications.

**Joanna Madalińska-Michalak, Professor,
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Joanna Madalińska-Michalak, Professor, University of Lodz, Poland. She is author of 11 books and author and co-author of more than 150 peer-review journal articles and book chapters.

Her recent publications are:

Michalak, J.M., Kwiatkowski, S.M., Nowosad, I. (eds). (2011). *Przywództwo w szkole i jej otoczeniu [Leadership at school and its surroundings]*. Wydawnictwo Difin, Warsaw;

Michalak, J. M., Kwiatkowski, S. M. (Eds.) (2010). *Przywództwo edukacyjne w teorii i praktyce [Educational Leadership in Theory and Practice]*. Fundacja Rozwoju Systemu Edukacji, Warsaw;

Michalak, J. M. (ed.) (2010) *Etyka i profesjonalizm w zawodzie nauczyciela [Ethics and professionalism in teaching]*. Wydawnictwo Uniwersytetu Łódzkiego, Lodz.

Joanna has been active in Polskie Towarzystwo Pedagogiczne (Polish Pedagogics Association) and served as a member of Executive Body in 2007-2011. Now she is Vice-President of Polskie Towarzystwo Pedagogiczne (Polish Pedagogics Association). She has served as a Member of Council Board of European Educational Research Association since 2008. She has taught at many universities in Europe: Sheffield Hallam University, University of Aveiro, Valencia University, University of Latvia, University of Tallin, State College of Teacher Education in Linz and Akdeniz University.

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and Lifelong Learning for the New Decade (R. Mark & H. Urponen, 2010) .

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Martínez-González, R.A. (2011). *Présentation du Programme-Guide pour le développement des compétences émotionnelles, éducatives et parentales*. [Presentation of the Programme Guide for the development project for emotional, educational and parenting skills.] *La Revue Internationale de L'Éducation Familiale*, 30 (17-38).

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Stephen is a member of the Executive of AULRE (Association of University Lecturers in Religious Education). He is also a member of the Editorial Boards of the *Journal of Moral Education* and the *Journal of Beliefs and Values*.

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Piotr participants in several international research networks, from 2009 Coordinator of Sociology of Education Research Network, European Sociological Association.

His recent publications include:

The theoretical foundations of the concept of social capital and their implications for educational empirical research, *Culture and Education*, 2011, vol. 6, pp. 76-96;

School dropout in secondary education: the case of Poland, w: Stephen Lamb I et.al. (ed.), *School dropout and completion. International Comparative Studies in Theory and Policy*, Springer, 2011, pp. 173-190;

The 'trajectorisation' of Educational Biographies as an Unintentional outcome of educational expansion In Poland, w: Andreas Hadjar, Rolf Becker (ed.), *Expected and Unexpected consequences of educational expansion in Europe and the US. Theoretical approaches and empirical findings in comparative perspective*, Bern: Haupt Verlag, pp. 153-167, 2010, (coauthor with Jarosław Domalewski and Krzysztof Wasielewski)

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Gonçalo Canto Moniz is an Architect and Senior Lecturer, Department of Architecture, Centre for Social Studies, University of Coimbra. He is the author of several articles on modern school architecture and author of the book:

Arquitetura e Instrução: O Projecto moderno do Liceu: 1836-1936 (Architecture and Education: Modern Project of Lyceum: 1836-1936), Coimbra, e|d|arq, 2007.

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Dr. Hilary Monk is a lecturer in early childhood education at Monash University, Melbourne, Australia. She is a full member of the Child and Community Development Faculty Research Group. Her research Interests include: Family pedagogy, Intergenerational families, Cultural-historical theory, Visual methodologies and Adult education.

Hilary's latest publications include:

Monk, H. (2011, September 5-10). *Child development across the generations: 'we-ness' and 'between-ness' in Australian families*. Paper presented at the International Society for Cultural and Activity Research (ISCAR) Congress, Rome, Italy.

Monk, H. (2010). *Learning and development across the generations: A cultural-historical study of everyday family practices*. Unpublished Doctor of Philosophy Thesis, Monash University, Melbourne, Australia.

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Jesús Romero Morante is professor of Social Science Education in the Department of Education at Cantabria University (Spain), and belongs to the group of educational research and innovation known as Fedicaria. He has written several books and a handful articles on social science teaching and education for citizenship, history of the curriculum, the didactic use of information technology and teacher training policies. He is also Associate Editor (Spanish language) of the journal Education Policy Analysis Archives (Arizona, USA).

Anabel Moriña Díez, University of Seville, Spain

Anabel Moriña Díez, P.hD in Education, University of Seville, Associate Professor. She is the author of the article:

Moriña, A. (2010). School Memories by Young People With Disabilities: an Analysis of Barriers and Aids to Inclusion. *Disability & Society*. Vol. 25, 2, Pag. 163-175

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Reza Najafbagy is currently Director of the Ph D Public Administration Program, at the Faculty of Management and Economics at the Islamic Azad University, in Tehran, Iran. She has conducted extensive research on comparative

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Romuald Normand is Associate-Professor of Education at the Ecole Normale Supérieure, Lyon, France. He works on education policies in a comparative and sociological perspective focusing on the issues of Europeanization, policy borrowing, global expertise and the transformation of the State. Fulbright scholar, he is also a member of the editorial board of the British Journal of Sociology of Education, Link-Convenor of the ECER network "Sociologies of European Education" and co-editor of the Routledge book series "Sociologies of European Education with Martin Lawn and Kerstin Martens.

Romuald has published several papers in journals (British Journal of Sociology of Education, European Educational Research Journal, Journal of Educational Administration and History) and book chapters: Mangenot E., Rowell J. (coord.) What Europe constructs: New Sociological Perspectives in European Studies, Manchester University Press; Nir A., (ed.) Centralization and School Empowerment From Rhetoric to Practice, Jerusalem, The Hebrew University, Nova Publishers.

One of Romuald's recent works has been published by Peter Lang (2011): Gouverner la réussite scolaire. Une arithmétique politique des inégalités [Governing academic success. Political arithmetic inequality], Bern (Switzerland).

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Dr. Paik currently serves on several advisory boards including the Editorial Board of the American Educational Research Journal – Social and Institutional Analysis, a prestigious publication of AERA. She is also an advisory board member for Partnerships for Educational Excellence & Research (PEER)—A South African Schools Partnership Project, European Research Network About Parents in Education Scientific Committee, and several advisory committees at Claremont Graduate University.

Paik, S. J., & Walberg, H. J. (Eds.). (2007). *Narrowing the Achievement Gap: Strategies for Educating Latino, Black, and Asian Students*. New York: Springer.

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From 2006 to 2009 he was Director of the Department of Anthropological Sciences and since November 2009 has been President of PERFORM (Centre of continuous training of the University of Genoa). He's also been President of Italian Evaluation Association from 2005 to 2007.

Since 1975 till now he has written more than 150 essays and books on methodology of social research, evaluation, local

and regional policies and planning, social inequalities and social mobility.

Mauro has also taken part as speaker or organizer of many meetings regarding evaluation of public policies, social inequality, training and labour policies, assessment of social policies. He's member of the board of some Italian sociological Reviews and Director of the Book Series "Evaluation", published by FrancoAngeli (Milan).

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Pat Petrie is Professor in Education at the Institute of Education, University of London, where she heads the Centre for Understanding Social Pedagogy. A strong emphasis in her research has been the role of the social and freetime pedagogue in many sorts of children's services, from play and day care services to services for children in residential and foster care. She has also examined the place of the arts in pedagogical practice. With Peter Moss she wrote *From Children's Services to Children's Spaces*, (London: Taylor & Francis, 2002).

Among Pat's recent publications is a short book of training material:

Communication Skills for Working with Children and Young People: Introducing Social Pedagogy, (Jessica Kingsley Publishers, 2010).

Vicente Chua Reyes, Jr., Nanyang Technological University (NTU), Singapore

Dr. Vicente Chua Reyes, Jr. is Assistant Professor in the Policy and Leadership Studies Academic Group of the National Institute of Education (NIE) - Nanyang Technological University (NTU). He is the Programme Coordinator for the Doctor in Education Programme of NIE. Dr. Reyes is a Fellow of the Centre for Chinese Studies of the Republic of China (Taiwan) and is also a Visiting Fellow of the National Taiwan Normal University. He also pursues research inquiries into governance and its impact on educational policy and practice. He has published research

articles with the Journal of Education Policy, Asia Pacific Journal of Education, Journal of Developing Societies and the Asian Journal of Politics. One of his most recent book publications (March 2009) is titled "Corruption and Implementation: Case Studies in Philippine Public Administration." Currently, Dr. Reyes is working on a book with Routledge that focuses on the Political Economy of Education Reform.

Luisa Ribolzi, National Agency for the Assessment of University and Research Institutions (ANVUR), Rome, Italy

Luisa Ribolzi, professor of sociology of education, is now working at ANVUR (National Agency for the Assessment of University and Research Institutions). Luisa Ribolzi has conducted research mainly in the field of sociology of education. This dealt with the institutional aspects of training, especially with regard to the organizational and public / private relationship (The system cast. Autonomy , choice and quality in the Italian school, in 2000 II; Choice family and school autonomy in Europe , 2003, A . Maccarini, Italy, the impossible choice, in Regulating schools to promote 'civic values, Brookings Institution , Washington, 2004) to the evaluation of systems (assessment in autonomous schools , 2001) , and the professionalism of teachers, as well as issues about the relationship between school and the labor market, even in the international arena.

As the coordinator of the group of sociologists of education, Luisa has edited a collective volume (Form Teachers, 2002). As part of the transition between education and sociology of the family, explored the theme of family participation in school governance (family, school and social capital in Donati P. (Eds.), Family and Social Capital in Italian society, CISF eighth Report on the Family in Italy , Sao Paulo , Milan , 2003).

With regard to educational policies, Luisa has also published with P. Ferratini and V. Campione:

Campione, V., Ferratini, P., & Ribolzi, L. (2005). *Tutta un'altra scuola. Proposte di buon senso per cambiare i sistemi formativi* [That's another kind of school alltogether. Sensible proposals for changing school systems]. Bologna: Il Mulino.

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Ellen's research focuses on public-private partnerships in infrastructure development, citizen participation in public policy making, and immigration.

Alessandra Samoggia, University of Bologna, Italy

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Pasquini, A. Samoggia, *Ideational factors and choices of life as a couple, in: Genders in the Life Course*, DORDRECHT, Springer, 2007, pp. 95 - 112 (The Springer Series on Demographic Methods and Population Analysis) [capitolo di libro]

L. Pasquini, A. Samoggia, The determinants of marriage and cohabitation in Europe, «*QUADERNI DI DIPARTIMENTO DI SCIENZE STATISTICHE*», 2007, 3, pp. 1 - 22 [articolo]

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Hannu Simola is Professor, Sociology and Politics of Education, University of Helsinki. Hannu Simola's research areas range from the socio-historical construction of schooling and teaching to education policy and politics with a focus on the effects of quality assurance and evaluation (QAE) as a new technology of governance in education. His current research examines problems of education policy transfer, in particular how the trans-national meets the national and the local in policy and politics of education.

Christine Skelton, University of Birmingham, England.

Christine Skelton is a Professor of Gender Equality in Education at the University of Birmingham, UK. Christine Skelton has been the recipient of two book prizes from the Society of Educational Studies for her co-authored book with Becky Francis, *Feminism and 'The Schooling Scandal'* (awarded in 2010) and monograph *Schooling the Boys* (awarded 2002).

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