New Challenges to Education: Lessons from Around the World

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Preface

Nikolay Popov

New Challenges to Education: Lessons from Around the World

This volume contains a collection of selected papers submitted to the XIX Annual International Conference of the Bulgarian Comparative Education Society (BCES) held in June 2021. The XIX BCES Conference theme is *New Challenges to Education: Lessons from Around the World*.

The book includes 40 papers written by 66 authors from 15 countries. The volume starts with an introductory piece co-authored by Zoltán Rónay and Ewelina K Niemczyk. The other 39 papers are divided into 6 parts representing the thematic sections:

1) Comparative and International Education & History of Education (3 papers);
2) International Organizations and Education (4 papers);
3) School Education: Policies, Innovations, Practices & Entrepreneurship (13 papers);
4) Higher Education & Teacher Education and Training (5 papers);
5) Law and Education (8 papers);
6) Research Education & Research Practice (6 papers).

The papers included in this year's conference volume outline a variety of challenges all actors in the education process (students, teachers, administrators, policy decision makers) at all levels of the education systems have recently faced. Readers can find conceptual and empirical studies, quantitative and qualitative methods, descriptive and analytical approaches, and even pessimistic and optimistic authors' views. This volume presents how novel concepts, ironical definitions, and provoking considerations are born in difficult times, when restricted life meets unrestricted spirit.

The past two years have shown how fragile or sturdy, vulnerable or protectable, conservative or innovative things in education are. In this compilation book, readers, who are interested in educational processes around the world, can find interesting examples of damages caused, mistakes made, successes achieved, chances missed, opportunities used, and lessons learnt.

May 2021

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Introduction

Zoltán Rónay & Ewelina K Niemczyk

A Worldwide Pandemic and Academic Freedom: Challenges of the Changing Landscape

Abstract

In the last decades, increased number of scholars warned that academic freedom is at risk, not only due to the authoritarian tendencies of some governments but also due to globalization and an increased pressure on academic performance. Based on the most current literature, this paper brings attention to the impact of Covid-19 on academic freedom. The findings show that the pandemic placed the conversation about academic freedom into a new dimension, introducing new challenges for which academics and higher education institutions were not fully prepared. Zooming on the observed developments in teaching and researching during the pandemic, it became evident that (a) the shift to online platforms made the privacy of classroom conversations disappear and (b) the dissemination of knowledge gained through scientific work contradicting governments' narrative was restricted. Overall, this work offered an opportunity to highlight the importance of academic freedom and to recognize the urgency to monitor academic freedom globally as it becomes increasingly vulnerable.

Keywords: academic freedom, Covid-19, higher education, pandemic and education, research and instruction, zoombombing

Introduction

As evident within scholarly literature, academic freedom (AF) is a fundamental component of universities, pursuit of knowledge and innovation, research collaboration, and quality teaching. The notion of AF is in strong connection with institutional autonomy, which is part of universities' identity since the beginning. The institutional autonomy and AF were the protections put in place against the endeavors of the church and later of the state to influence and restrict institutional and individual functioning. In fact, the phenomenon of State interventions still exists nowadays and is documented in several publications of the last decade (Ren & Li, 2013; Rónay & Niemczyk, 2020). The fragility of AF was always present, however, in 2020 the whole world, including the sector of higher education faced new dangers and demands posed by COVID-19. Universities and academics were forced to respond to the challenges of the pandemic in a thoughtful and timely manner. The new circumstances of crisis placed the conversation about AF into a new dimension.

The connection between COVID-19 and AF is two-sided; AF is crucial to managing the pandemic situation meanwhile the circumstances resulting from the pandemic seem to restrict this freedom. The literature showed that "[s]cience and

research are crucial to tackling the COVID-19 crisis" (Chan, 2020, p. 10), moreover, AF can strengthen researchers' creativity and innovative skills, which are essential in times of crisis (Corona Times Editorial, 2020).

Meanwhile, lack of AF can result in negative effects. For instance, it may weaken the success of sustainable solutions and support governments' hidden agenda threatening democracy and the rule of law.

The Global Public Policy Institute (GPPi, 2020) recognizing the changing landscape and insufficient knowledge about factors that sustain and threaten AF undertook an important initiative. In collaboration with the Friedrich-Alexander-Universität Erlangen-Nürnberg, the Scholars at Risk Network, and the V-Dem Institute, the GPPi developed the Academic Freedom Index (Afi) with the intention to monitor and protect AF across nations. Current data illustrates that nations where institutional autonomy is respected have a higher level of AF in terms of research and teaching (GPPi, 2020).

Based on the most current international literature, this paper presents impact of the pandemic on AF. In the following section, we first provide clarification about the notion of AF and how we understand it in our work. Then we move to discuss specific examples where AF was impacted by developments in HEIs across nations. Thoughtful of the length constrains of the paper, our attention was devoted to key teaching and researching practices.

Notion of academic freedom

In connection to the purpose of this paper, we understand academic freedom as the right to (a) teach and express one's validated truth, (b) conduct research based on own research interests without political and commercial influence, (c) share research findings and ideas within chosen professional and public platforms. According to us, the following two definitions are relevant today as they were years ago.

Seventy years ago, Albert Einstein declared the following:

> *By academic freedom I understand the right to search for truth and to publish and teach what one holds to be true. This right implies also a duty: one must not conceal any part of what one has recognized to be true. It is evident that any restriction of academic freedom acts in such a way as to hamper the dissemination of knowledge among people and thereby impedes rational judgment and action.* (Reichman, 2017, para 2)

Meanwhile, more than 30 years ago, the Committee on Economic, Social and Cultural Rights provided the following understanding of AF (UN, 2020b, p. 6):

> *Members of the academic community, individually or collectively, are free to pursue, develop and transmit knowledge and ideas, through research, teaching, study, discussion, documentation, production, creation or writing. Academic freedom includes the liberty of individuals to express freely opinions about the institution or system in which they work, to fulfil their functions without discrimination or fear of repression by the State or any other actor, to participate in professional or representative academic bodies, and to enjoy all the internationally recognized human rights applicable to other individuals in the same jurisdiction.*

The above provided definitions reflect our stand on AF. We also recognize that times of crisis call for taking AF with special care, sensibility, and consideration for consequences. To that end, scholarly literature emphasizes researchers'

responsibility to be objective and transparent. As academics we have much to offer, this includes awareness that even our truths might at times be temporary and clouded, especially in times of crisis. Therefore, in order to serve as contributors of sustainable solutions in this global time of uncertainties we need to be highly reflective of AF in our practices. Part of the right to AF entails freedom to refrain from reactive comments and rushed publications recognizing that in this situation there is more that we do not know than we do know.

Challenges of the changing landscape

With the outset of 2020, COVID-19 became one of the most popular research topics. The pandemic's widespread effects involved researchers from every discipline and every continent trying to find solutions to the issues caused by the pandemic. Since the mission of research is to critically investigate a given phenomenon and its reactions, scientists engaged in debates with each other and with the governments (Corona Times Editorial, 2020). It was not surprising that scientists articulated their views about the actions of governments and international organizations. With help of social media, diverse types of information, at times contradicting, rapidly reached people making them at times unsure of what is credible (Chan, 2020).

The engagement of different education stakeholders in finding solutions, especially in areas of teaching and researching showed that AF matters and needs to be safeguarded. In fact, several challenges pertaining to AF in research intensified with the pandemic. It must be noted that not all the nations were able to release reliable research, reports and recommendations regarding the pandemic or relevant education strategic planning. Less democratic nations as well as authoritarian figures in democratic nations have restricted dissemination of scientific knowledge differing from the official narratives. Some scientists have been censored by their governments in the process of trying to share information about Covid-19. According to news reports, as of 2020 there was an increase in online harassment and censorship (e.g., deleted posts from social media, canceled presentations) as well as investigations and suspensions of academics by universities. It is worth noting that such practices are used not only to silence specific scholars but also to send a strong message to others to self-censor.

Although AF is guaranteed in many nations, it is evident that researchers whose ideas differ from the government's views are exposed to harassment. In the past year, many reports showcased instances where governments attacked researchers for their views and questions raised. As reported by Vaughan and Ncayiyana (2020), Glenda Grey, a pediatrician and scientists who also served on the Ministerial Advisory Committee for the South African government during the pandemic was chastised publicly for contradicting government policy. After expressing her concerns about some restrictions implemented during the pandemic, she was accused of distributing false allegations. It was rewarding to see that academic community defended Grey reaffirming that freedom of speech of competent specialists is in interest of the public. As reported by several news platforms, the Academy of Science of South Africa released a public statement defending Dr. Grey and stating that "to threaten researchers and to muzzle their voice would have a chilling effect on creativity, innovation and experimentation" (ASSAf, 2020).

Ms. Khan who is UN Special Rapporteur on the promotion and protection of the right to freedom of opinion and expression stated the following:

> *Censorship kills scholarship. Attacks on academic freedom corrode the pillars of democratic life, scientific progress, human development, and also the right of all human beings to freedom of opinion and expression… In the face of the unprecedented challenge of finding an effective response to COVID-19 pandemic, it is more important than ever that the academic community be allowed to research, debate and disseminate and share knowledge freely including through across border cooperation without harassment, repression or persecution.* (UN, 2020a, paras 5-6)

In other cases, AF was restricted through provision of financial support to HEIs by authoritarian governments. As reported by Rónay and Niemczyk (2020) even prior to the pandemic, universities and funding agencies supported specific type of research according to their agenda. In order to get the funds, researchers were placed in a position to maneuver between their research interest, requirements of the funding agency and publishing possibilities. In many cases, COVID-19 is also used as an excuse by governments to reduce AF by direct tools, or indirectly, reallocating financial sources, or simply creating a public mood in which the scientists feel insecure. Chan and colleagues (2020, p. 18) stated that "Now governments threaten to regulate freedoms and the withdrawal of funding to ward off evidence and comments that do not support the narrative they wish to paint". In addition, Furstenberg, Prelec and Heathershaw (2020) reported that the need for funding has forced many HEIs to collaborate with governments in authoritarian states, whose policies delimit the space for freedom of expression and thinking by controlling what is taught, researched, and discussed at university campuses. To that end, human rights experts often criticized institutions and nations for relying on funds that come with a list of expectations.

Not only aspects of research activities were influenced by the pandemic but also teaching practice. The pandemic forced universities to move to online teaching creating several vulnerabilities and challenges. Some of the documented struggles include planning to include all students, providing access to technology and resources, designing new support services and developing new curricula. The use of e-platforms such as Zoom or Skype provided a setting and a solution for effective online teaching. However, it also introduced some challenges. As reported by Poliakoff (2020), prior to pandemic, classroom discussions were kept mainly confidential, however, with the online platforms and virtual permanent record, the privacy of classroom conversations disappeared. He further adds that:

> *Students and faculty alike need concrete, credible guarantees that the classroom does not become like Twitter, where a statement can go viral, ruin one's career, and exist on the permanent record.* (Poliakoff, 2020, para 8)

Loss of classroom privacy and lack of security measures in accessing video-conferencing platforms impacted aspects of AF. Although threats posed to academics existed long before the pandemic, the new phenomenon called "Zoombombing" escalated the situation, exposing academics' reputation and career to harm. As described by Bearfield (2020, para 2) zoombombing refers to a situation "when outside parties seek to disrupt Zoom or other online chats and gatherings with potentially harmful behavior. These types of attacks have been occurring at an alarming rate and are threatening to the educational community." As reported by

McKenzie (2020), the incidents of disruptions in online educational platforms are becoming more frequent. Sometimes, the disruptions are random, other times specific institutions and classrooms are being targeted.

Unfortunately, there are cases reported where students shared details and passwords to scheduled online Zoom meetings with others. After the intruders enter the meeting, often posing as students, they disrupt class meetings by making irrational questions and vulgar comments; promoting specific political views and sharing racial remarks; or posting inappropriate images and sounds. Professors, especially those with little experience with video conferencing platforms such as ZOOM reported struggling to manage their e-classroom. With awareness of the above-mentioned risks, many universities adapted new policies prompting students and staff to cope with the remote teaching and online communications in respectful ways. The institutions also made use of protective practices such as using passwords and codes in order to enter scheduled meetings. Some HEIs published preventative intrusion guides (McKenzie, 2020).

As evident, closure of HEIs and shift to online interactions exposed many vulnerabilities. Professor Katrin Kinzelbach warned that although the closure of universities was a justified way of combating the pandemic, there was a risk that some governments may use the crisis as a pretext to increase political control over HEIs (Sawahel, 2020). For instance, in Hungary, the government announced a state of danger. This decree ensured the government an extra power, which the Parliament enforced (to assess this, see Chan et al., 2020). However, not this extra power was the tool of AF's restriction. The Hungarian government party has an extra majority in the Parliament, which allowed them power and offered by the pandemic situation to pass some crucial amendments. While most people were occupied with the virus concerns, many state universities became so-called foundation university. This means that the maintainer of these HEIs is not the state anymore, but several foundations, which are financed by the state and whose governing board members are delegated by the government. Most of these members are current ministers or people belonging to the sphere of interest of the government party. The most important element of this model (which was introduced originally by the Act XIX of 2019) is that this governing board can take away the senate's former power. Thus, they can decide on all matters of education, inside regulation, and university leaders' appointments, including the rector. With this amendment, that type of university lost its autonomy and the AF.

Conclusive thoughts

While academic freedom was already vulnerable in the last decades, its vulnerability increased as the entire education sector had to face unexpected new challenges opposed by the pandemic. Due to Covid-19, AF is threatened not only by government policies and funding agencies, but also by the censorship of scientists which became more prominent along with restrictions of free speech practiced by the universities themselves. Scholars agree that only AF can ensure the successful handling of all aspects related to COVID-19. Yet, it must be noted that the online teaching and intensified use of technology in research maximized the fragility of AF. Some reactions, even those of the academia are worrisome and raise further questions. For instance, where is the border between practicing responsible criticism

by scholars and self-censorship? How stable can AF be considering that researchers themselves give up easily? Through this work, we aim to promote much needed conversation about AF during the time of crisis. Without doubt, the pandemic has a complex impact on AF, which needs to be closely monitored and implications anticipated.

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Part 1

Comparative and International Education & History of Education

Charl Wolhuter

"Lessons from Around the World": *Raison d'être* and Achilles Heel of Comparative and International Education

Abstract

The aim of this paper is to tease out the caveats in the much vogue exercise of drawing lessons from foreign systems of education — the theme of this book, with the final objective that this will point to the parameters appropriate for the discourse and for the reader when reflecting on the topics touched upon in this book. The paper commences with a survey of the historical evolution of the field of Comparative and International Education, demonstrating how the motivation for extracting "lessons" from other education systems has been a key feature of the field, and increasingly so in contemporary times. The caveats to exercise, related to the salience and complexity of context, to the nature of the act of education, and to the undermining of the professional autonomy of the teacher are then pointed out. These parameters should be respected in any discourse on taking education lessons from around the world. At the same time, these parameters present scholars of Comparative and International Education an opportunity to prove their value in the twenty-first century world.

Keywords: Comparative and International Education, education, education reforms, education system context, societal context

Introduction

For its entire history, "lessons" from the education of other countries (or systems or institutions), in terms of best ideas, policies and practices, have been a major source of inspiration for conducting comparative studies of education and for justifying the existence of the scholarly field of Comparative and International Education. Developments in the last thirty years have given this practice a new lease of life. Yet this exercise is at the same time fraught with dangers, as is also pointed out by a growing corpus of literature.

The theme of this volume is *New challenges to education, 'lessons from around the world'* and indeed where education faces challenges all over the world, many of which are universal challenges or at least common to large parts of the world, it is natural that object lessons will be looked for in other parts of the world. The aim of this paper is to tease out the caveats in such an exercise, with the final objective that

this will point to the parameters appropriate for the discourse and for the reader when reflecting on the topics touched upon in this book.

The paper commences with a survey of the historical evolution of the field of Comparative and International Education, showing how the motivation for extracting "lessons" from other education systems has been a key feature of the field, even increasingly so in contemporary times. The second part of the paper then enumerates the caveats involved in such an undertaking. In conclusion then the parameters for engaging in extracting lessons from other education systems are spelled out.

The historical evolution of Comparative and International Education: Extracting lessons from abroad the *raison d'être*

The historical evolution of the scholarly field of Comparative and International Education is commonly depicted as seven phases (see Wolhuter, 2021). The first five phases till the end of the 1960s, are derived from the phaseology of two leading scholars in the field Harold Noah and Max Eckstein. They named these a phase of travellers' tales, a phase of the systematic study of foreign education system with the intention of borrowing, a phase of international cooperation, a "factors and forces" phase, and a social science phase. The last three phases, taking the story from the 1960s were named by Roland Paulston as a phase of orthodoxy (this is the same as the social science phase of the Noah & Eckstein phaseology), a phase of heterodoxy, and a phase of heterogeneity. These phases do not represent a sequence, i.e. one phase replacing the preceding, but a progressive expansion of the field, with each phase continuing up to today.

The first two phases are regarded as prescientific phases in the historical evolution of the field. While it can easily be argued that travellers' tales inspire listeners or readers to take lessons to heart, it is especially in the phase of the systematic study of foreign education systems (and institutions) with the intention to borrow best ideas, policies and practices to improve the domestic education project, that the motivation, actually the prime motivation, of extracting lessons comes to the fore.

While the phase of international cooperation pursued the lofty final goal of the improvement of the state and conditions of the world and of humanity, even in the publication of Marc-Antoine Jullien, the ground-layer of this phase and commonly called the "father of Comparative Education", he saw borrowing of best education practices and policies between nations as a step towards this ideal (see Wolhuter, 2019). The purpose of his suggested collection of data from the education systems of all nations, and collating these in league tables, is evidence of this.

The "factors and forces" phase, reaching its zenith during the era of inward-looking nationalism between the two World Wars, and taking its cue from Michael Sadler's 1900 Guildford lecture, predicated on the uniqueness of each national context and national education system, may seem to rule out of bounds any exercise of borrowing. Yet, reading Wesley Null's (2020) recent biography of Isaac Kandel — central figure in the field in this phase — shows how much the ideal of borrowing the best was a burning ambition in the scholars of the phase. For Kandel the finest product of comparative study of education was for the student to analyse his/her own system of education and, from comparative studies, to add something to

the underlying philosophy shaping his/her own system of education, in an effort towards improving that system (Null, 2020, p. 42).

The social science phase as from the 1960s stands on the unbounded belief in the societal ameliorative potential of education, and that nations can learn and take over from each other as far as education is concerned. The whole theory of modernization, which became the main theoretical framework of the field in the 1960s and early 1970s, is based on the premise of the developing world (as the Global South was then termed) can take lessons from the developed world, also in their education development. In his much cited article on the use and abuse of Comparative Education, one of the main scholars of the phase, Harold Noah (1986) enumerates "help in decision making", that is drawing lessons from other nations, as one of the uses of Comparative Education. While a fixation on paradigms is often portrayed as the signature feature of the phase of heterodoxy (as from the 1970s), it is not difficult to detect the learning of lessons from abroad as constantly appearing rationale. For example, Robert Arnove's article on the 1980 Nicaraguan National Literacy Crusade, commences with parading the three exemplary adult literacy crusades in history (Cuba in 1961, Tanzania in the 1970s, and Nicaragua in 1980) as object lessons for other countries desirous of achieving universal adult literacy.

It has been, however, in the past generation (roughly since 1990) that the extraction of lessons from foreign education systems gained new currency in the public discourse of education, and riding on the back of that, new value in the field of Comparative and International Education. The contextual forces which favoured this turn of events include the rise of knowledge economies (giving more value to education as factor in the cut-throat competition between nations), the rise of what Thomas Friedman calls a "flat earth" (that is where the advantages that natural resources have bestowed upon countries have been wiped out by technological progress, in the new world competition between nations will be a function of political environment and expertise), globalization, the neo-liberal economic revolution, and the information and communications technological revolution. International test series such as the Programme for International Student Assessment (PISA) tests, and the colossal ranking of universities industry supply the data bases for these exercises. How strong a reference point the league tables stemming from these tests have become in both the public and scholarly discourse of education, is evident from publications such as Michael Crossley's 2018 Presidential Address of BAICE (British Association of International and Comparative Education) (Crossley, 2019), the edited volume of Alexander Wiseman (2010), and the top selling book of Pasi Sahlberg, *Finnish lessons: What can the world learn from educational change in Finland?* (Sahlberg, 2010) prompted by Finland coming unexpectedly out tops of the first round of PISA tests, and other nations scrambling to see which lessons they can take from the Finnish education experience. This has been one of the very rare instances in which a book in the field of Comparative and International Education manage to become a top seller among the wider reading public.

The problematique of extracting lessons from foreign systems of education

In the meantime a steady stream of literature pointing out the caveats involved in attempting to use foreign education systems as a source for lessons to improve the

domestic education project, including, in the recent past, the use of league tables of large international assessments as a starting point of such an exercise (e.g. see Klemenčič & Mirazchiyski, 2019; Meyer & Benavot, 2013).

To commence with, scholars of Comparative Education have long warned, justifiably and by substantiating their claims, the folly of exporting best practices (i.e. take lessons) from one context to another, without factoring in contextual similarities and differences between exporting and importing context. In fact, this has been the trade scholars of the field profess, especially when they criticize such exercises proposed by governments and other authors who, inconsiderately, and based on prejudices write eulogies on particular systems of education. Examples are copious, but there is for example Jonathan Kozol's *Children of the Revolution: A Yankee teacher in the Cuban Schools* (1978) on Cuban education, and the book review of this volume by leading Comparative Education scholar Erwin Epstein (1979). It is not only with respect to naïve lay (those not versed in the literature of Comparative Education) preachers of borrowing of best ideas, policies and practices that contextual negation can be detected. The societal and education system contexts in which education take place, each are of such complexity — each consists of a host of components, each of these components in turn consists of a long list of elements, and these components and elements can take on an infinitely number of configurations or permutations in a particular education system, so much so, that even in the most meticulous and elaborate of scholarly comparison a complete factoring in of all contextual similarities and differences is an impossible task.

Further to problem the infinitely complexity of contextual configurations there is the problem of the act of education being to at least a significant degree a voluntary act of indeterminancy, of at least two partners: the agency of the educand and that of the educator. This feature of education, often overlook by protagonists of "evidence based" policy or practice, has recently been explicated clearly in the book *The Beautiful Risk of Education* of Philosopher of Education, Gert Biesta (2014).

But apart from the indeterminancy or open nature of education, there is another facet of education which renders the taking of lessons, or of "evidence based policy" problematic. Taking lessons or then evidence based education decision/planning is based not only on objectionable extrapolating $x \rightarrow y$ relations, but it also implies a very narrow, technicist, instrumentalist take on education, and says nothing about the goals or objectives of education. Education has always a teleological side, that is it has an objective in mind in the sense of the formation of character, the internalisation of values, the realisation of capabilities. As Biesta (2020) in his recent critique on conventional education indicates, this side of education is not touched upon, and is beyond the reach, of any technicist "evidence based" policy or practice, or taking of lessons from others. If there is any doubt about this crucial side of education, the question can just be posed: "is all learning education?" — learning to engage in slave trade? Child abduction? Instruction in the executing of criminal activities? On the normative final objection of education, taking over best practices or policies cannot pronounce a judgement or provide any counsel.

Finally there is also the caveat of a system premised on learning lessons from others degenerating into a very prescriptive environment, crowding out all discretionary space and professional autonomy of the teacher. One of the distinguishing features of a profession is after all that the professional is engaged in

work activities of a non-stereotypical nature, where each case requires specific, even unique responses, to be made based on the expertise knowledge and professional judgement of the professional. This danger in a system of evidence based informed (or dictated) practice — besides all the other dangers involved, as outlined in earlier paragraphs — has been pointed out by Biesta (2020) as well as by scholars of Comparative Education, such as Dubeck, Jukes and Okello (2012), these scholars point out how the unique contextual configurations in each classroom alone render national policies of "one size fits all" render meaningless if not outright useless or even dangerous, and necessitate granting teachers the flexibility of professional autonomy.

Conclusion

Thus it appears that despite how much it is in the vogue in the world of today, taking lessons from foreign education systems, is an exercise fraught with danger. It would be foolish to discard all of the world's experience with education, or to descend what Meadows (2019), in the face of infinitely contextual complexity, calls "context paralysis", but the parameters set by the specificity and complexity of contextual configurations and the nature of education, should be respected when engaged in a quest to collect lessons from foreign education systems. In here, especially with the first proviso, is an opportunity for scholars of Comparative Education to ply their trade and prove their mettle in the world.

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What Was in the News? Conversations on Internationalisation of Higher Education in *University World News* in 2020

Abstract

The Covid-19 pandemic brought challenges to education in ways that could not have been foreseen, yet at the same time opened opportunities for new ways of thinking and doing, also in higher education. While other activities of higher education involuntarily quickly adapted and teaching and administration went largely digital in one form or another, thousands of international students were stranded and prevented from either travelling home or travelling to their institutions. Academics who intended to travel, were also grounded. The impact of the pandemic on internationalisation of higher education was indeed significant. Socially isolated, discussions that would normally take place at face-to-face gatherings, such as conferences and staff exchanges, came to a halt yet were still able to continue on digital platforms and in the media. In these fast-changing times, it is important to keep up with the latest thinking and in this paper, we explore the sensemaking that took place through *University World News* during 2020.

Keywords: internationalisation discourse, framing analysis, media analysis, global education, Covid-19

Introduction

Over the last three decades, there has been an increase in internationalised activities in the higher education sphere, driven by the massification of higher education, the development of a knowledge economy globally and the emphasis of performativity in university rankings in spite of a rhetoric around intercultural understanding and appreciation (de Wit, 2021). While mobility remained a pie in the sky for most students due to financial constraints, the internationalisation space changed from one of cooperation to competition (Van der Wende, 2001). In their report to the European Parliament's Committee on Culture and Education, de Wit et al. (2015, p. 29) adapted an earlier version to demarcate internationalisation of higher education (IoHE) as follows:

> *[T]he **intentional** process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, **in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society** (emphasis in original).*

They implored that IoHE "has to become more inclusive and less elitist by not focusing predominantly on mobility but more on the curriculum and learning outcomes" (ibid). This call was repeated in de Wit (2021) to include the different dimensions as mentioned in the demarcation in all aspects of higher education in a non-elitist and inclusive manner. Still, prior to the outbreak of the pandemic, IoHE

was "still predominantly focused on mobility, short-term and/or long-term economic gains, recruitment and/or training of talented students and scholars, and international reputation and visibility" (de Wit et al., 2015, p. 29).

The Covid-19 pandemic brought challenges to education in ways that could not reasonably have been foreseen, yet at the same time opened opportunities for new ways of thinking and doing. This is also applicable to the sphere of higher education, and specifically IoHE, which for a long time focused predominantly on staff and student mobility. While other activities of higher education involuntary adapted, and teaching and administration went mostly digital, thousands of international students around the world were stranded and prevented from either travelling home or travelling to their institutions. Face-to-face research- and capacity-building projects were severely hampered, academics who were due to travel to international conferences were grounded and face-to-face collegial discussions on matters of common interest were interrupted. The fast pace at which circumstances changed since the start of 2020, when the first case of Covid-19 was reported outside China and then rapidly spread through the world (World Health Organization, 2020), inevitably led to novel ways of knowing and being. With physical borders closed and social distancing the norm, interacting online via platforms such as Zoom, Google Meet and MS Teams, relying on digital content became standard practice.

While many research publications are surely forthcoming, at the time of doing the study, research publications on the effect of the pandemic on various domains of education, and the thinking with regard to matters in the field were limited due to the slow turnaround time for research to be published. Still, a lot of sensemaking happened through media, and as qualitative researchers such as de Wet (2020) argue, digital media allows researchers to access and use media publications and discussions, as secondary textual data. Working inter alia in the field of Comparative and International Education and with an interest in IoHE, we deemed it essential to engage with views from around the world to understand what the current thinking and discussions are. In this study we thus used news articles related to IoHE published in a specific online newspaper that claims to keep stakeholders in higher education "abreast of developments in their field" (*University World News*, 2021), in order to engage with the discourse during this time.

Approach

We used the keywords "internationalisation" or "internationalization" on the website of *University World News* and limited our search to publications in 2020. The search rendered 172 articles which we downloaded.

Only articles published in the *University World News* Global Edition were included. Thus, during analysis the authors removed the articles in the sample that were published in the Africa Edition of the publication. Further exclusion criteria included articles that focused only on a single institution, included singular examples of policy changes and articles in which mention is made of internationalisation, but there is no elaboration thereof or makes little contribution to the global narrative of IoHE (as defined by de Wit et al., 2015; this paper). This process rendered a sample of 116 articles. The two authors then independently read the articles and identified themes that crystallised. Afterwards we engaged on how we classified them, adapted the themes where needed and also reflected on the

general insight gained through the exercise. The articles were then again analysed to see how often different authors included the subtheme in the discussion. This also led to identification of topics that were salient in the discussions, which we will discuss afterwards.

The complete data sheet including the themes and subthemes as well as the URLs of all articles used is available upon request from the first author.

Themes

Pandemic and post-pandemic

Numerous articles, 53 (45.7%), discussed internationalisation in view of the Covid-19 pandemic. A prominent narrative found under this theme was an acknowledgement of the drastic effect of the Covid-19 pandemic on higher education, specifically regarding student mobility, enrolment and the loss of tuition revenue. Studying abroad has become less attractive due to the pandemic with reasons including cost, mobility issues and personal safety. Authors anticipated that the reduction in international student enrolment will have a detrimental effect on the financial stability of many higher education institutions (HEIs). Authors also noted quality concerns in online learning, the absence of purpose-built online teaching material, student anxieties and a lack of staff training. Leask and Green (2020), for instance, described the unprecedented pace at which institutions had to transition to online learning as having provoked a "panic-gogy".

Although, it was evident that the pandemic caught HEIs around the globe off guard, Covid-19 is posed not only as a challenge, but also a catalyst for opportunity. Many authors pointed to possibilities that the situation brought to the international higher education arena, which include new forms of pedagogy, tremendous initiatives from staff and students alike and as offering a chance to reboot and reshape academic mobility, making it more inclusive and more environmentally sustainable. A few authors even provided their perspective on the post-pandemic future of higher education (HE).

International amelioration and the common good

Several internationally relevant matters, beyond the scope of HE, came to the fore. Discussion under this theme centred around global issues and the common good. Subthemes included international cooperation, interdependence of nations and social and environmental sustainability. Authors specifically deliberated on matters related to human rights, diversity and democracy, and particularly academic freedom in HE across the globe received attention. Discussions reflected a growing awareness of the positive environmental impact of decreased physical mobility in HE. Concerns were raised about inequality in the international HE sphere, with specific reference to North-South inequality and the limited progress that was made with regard to the position of women and other vulnerable groups, including foreigners. A narrative that was repeated by various authors is the increasing tension HEIs are experiencing around mobility resulting from increasing nationalist tendencies, populism, racism (both pre-existing and Covid-related racism) and strong public anti-immigration discourses. Selected authors, for example, reported an unsettling rise in instances of racism, discrimination and even assault towards

students of Asian heritage which is affecting their choice to study abroad. Seventy-eight (67.2%) of the analysed articles included this theme.

Neoliberalism

It was of no surprise that the influence of neoliberalism was present in some of the discussions – the influence of internationalisation of institutions on their ranking, performativity and competitiveness often came to the fore. Clearly HEIs globally, are under great pressure to produce employable graduates with performance-based funding models. Authors noted that governments and policymakers put strong emphasis on the importance of effectively preparing graduates for the world of work. The clear focus is on competitiveness and developing the human commodity. There is a notable concern regarding attracting and retaining foreign students, especially within the pandemic era. Great emphasis is placed on the need to retain and attract Chinese students, due to the financial injection they represent. In the UK, for example, Chinese students represent 45% of all international students (Mok, 2020). In accordance with this, various authors discussed the ambitious programmes to attract mobile academics or repatriate their own citizens after they earn degrees abroad. Twenty-seven articles directly discussed policy changes and reinvention, of which the majority was focussed on policies that would promote neoliberal ideals. Others challenged institutions for exploiting foreign students who use them as cash cows to strengthen their finances. Fifty-two (44.8%) of the analysed articles included this overarching theme.

Internationalisation of higher education

Various aspects specifically pertaining to IoHE were addressed in the articles (84; 72.4%). Some of the subthemes related to the nature of IoHE and comprehensive internationalisation (9.5%), partnerships and networks (5.2%), international research and research collaboration (5.2%). It was evident that international collaboration is highly desirable as it is perceived as making universities competitive in the much criticised, but highly visible, global rankings. Various articles also mentioned internationalisation at home, which is posed as a solution to the mobility problem, but also a threat to attracting international students.

Articles furthermore focused on the aims of IoHE, including cultural competences and student attributes (6,0%), but by far the most dealt with student mobility (53.4%), often linked with concerns raised with income generated by international students as mentioned in the previous section. There was also some mention of virtual exchange (4.3%) and staff mobility (3.4%). The discussion also highlighted the importance of continuous regeneration and rethinking of IoHE with an emphasis on digital media, innovative teaching and learning tools and the use of virtual platforms as needed for international competitiveness.

Staff and students

Forty-five (38.8%) of the articles included a focus on the role-players in the IoHE space, namely staff and students. Twenty-four (20.7%) of these acknowledged the importance of student support and 14 (12.1%) on students' experience.

Whose views are portrayed

Jacobs (2014) alludes that information in the media is always partial, yet UWN (2021) assures that they use a "network of some five dozen education journalists based in more than two dozen countries, with representation in all regions". We analysed who entered the discussion on IoHE in this outlet in 2020, by doing a rather blunt analysis simply in terms of where the authors are situated. In this sample analysis, 48% of the articles were written or co-written by authors in Europe (including the UK), followed by authors from North-America (22%), Asia (20%), Africa (4%), Australia (3%) and lastly South America (2%). We need to emphasise that these statistics are not representative of all the articles in the newspaper, but specifically pertaining to IoHE, and given that the discourse on IoHE is still largely in the Global North, this is not unsurprising. De Wit (2021, p. 27) argues that there is a risk that "internationalization continues to be perceived as strengthening the dominance of the existing powers in international higher education: regions, nations, and institutions".

Discussion

Upon reading through the articles, certain underlying issues caught our attention. It seems that even pre-Covid-19, debates have been emerging regarding the future of IoHE. This seems to be amplified by the pandemic, especially with the limits on student mobility. Students are beginning to question the feasibility of studying abroad and the value and benefits that international education brings. There seems to be a conviction by most authors that HE has irrevocably changed. While some are convinced that the pandemic opened up opportunities and will change the HE landscape for the better, others have a more gloomy outlook. Still, a few authors are of the view that eventually we will return to the pre-pandemic status quo.

The current dominant discourse in IoHE is focused on the neoliberal obsession with funding, rankings and the global competitiveness of both universities and graduates (Bamberger, Morris & Yemini, 2019), and this was also the case in the sample of articles. There is a concerning absence of the student in the discussions as little is written beyond their economic value. Especially within the parameters of the loss of student mobility and the corresponding migration to online learning, one would expect the focus to be on supporting students in this regard. The pandemic has placed international students around the world in extraordinarily challenging situations, many stranded either at home or at foreign institutions. Despite this, any discussion about the well-being of international students is salient. This is most apparent in the articles written by non-Chinese authors about the mobility of Chinese students. Students are mostly discussed as a commodity and not as individuals who require support.

The analysis has illustrated that in many cases neoliberal ideals are being pursued at the expense of student well-being, multilateralism and global solidarity. IoHE seems to no longer be about academic and cultural exchange (if it has ever been). It is therefore perhaps time to question the ethics behind internationalisation outcomes (Pashby & de Oliveira Andreotti, 2016). For example, even though concerns are raised regarding the increasing instances of unilateralism, nationalism and racism, less than five articles discuss the need to develop global citizenship and

intercultural competencies in students. None of the articles explored the possibility of preparing the current study bodies for international students and the diversity they bring. This is especially concerning when one considers the aims of internationalisation as described by de Wit et al. (2015).

A second issue the authors noted is the void in the discussion regarding the issues of Covid-19 – we expected a significant number of articles to focus on the actual quality of the online education provided and providing staff and student support. However, very few articles mentioned it and none focused on it. The concerns, once again, reflect the neoliberal nature of our times. The articles that mention quality concerns emphasised that there has been no time to train lecturers to deliver online, to reconstruct the pedagogy or to engage with professional instructional designers. Solutions were rarely suggested.

Furthermore, there seems to exist an imbalance in the foci of the discussions. IoHE is constructed as emulating the experience of the West in a global context of Western dominance. This holds true even in discussions that includes collaboration outside the Northern hemisphere. This is most clearly illustrated in the absence of discourse surrounding decolonisation, transformation and North-to-South mobility. These concepts are an important part of the IoHE narrative and we expected these topics to feature more prominently. Similar concerns have been raised by Bamberger, Morris and Yemini (2019).

Although we excluded the Africa editions, as we reasoned that the readership would be limited, we did realise that many global issues including transformation and decolonisation were discussed in these editions. We would recommend scholars around the world to take heed of the discourses taking place on this platform and we intend to follow up this paper to focus on these issues.

Limitations must, however, be noted. Firstly, we used only one newspaper albeit one with a good reputation that is freely available and with a definite focus on higher education matters. Secondly, we acknowledge our own subjectivity in the study. We furthermore only did a synoptic analysis and will delve into the underlying discourses in a follow-up study. Still we believe that it provides for a glimpse of the discussions that are taking place in the IoHE sphere and can inform future discussions.

Conclusion

It was clear that the views shared on the platform were somewhat repetitive and clearly authors were grappling with certain issues. Although predictions of the future were forthcoming, solutions were not readily so. Clearly IoHE has strong elements of "wickedness" (Hagenmeier et al., 2020), where solutions are not ready, uncomplicated or even inferable and when implemented will certainly present their own challenges.

De Wit et al. (2015, p. 29), perhaps idealistically, described IoHE as being focused on "the quality of education and research for all students and staff, and to make a meaningful contribution to society". This analysis has made it evident that this is not the ideals HE is striving for and that internationalisation is still deeply intertwined within the neoliberal ideals and practices.

Acknowledgements

We want to acknowledge the admirable work done by UWN to provide a platform for discussions on matters pertaining to HE around the globe. The critique offered in this paper was not directed at the publishers, but at the mindset of scholars in the IoHE space.

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English as a Foreign Language and Motivation for Learning: A Comparative Perspective

Abstract

In recent years, the need for English as a foreign language (EFL) education in schools has become a priority worldwide. The aim of our paper is to investigate which countries currently focus on researching motivation to learn EFL and what potential reasons are behind the focus. We performed a topic search of the keywords "EFL" and "motivation" in the *Web of Science* database for 2020. In total, we found 61 Social Sciences Citation Index (SSCI) articles. Asia prevails, especially Eastern Asian Chinese speaking regions (Mainland China, Taiwan, and Hong Kong). Policies in Asian regions such as China and Taiwan highly support EFL. There is the aim to develop Taiwan into a "bilingual nation". Likewise, the European Union promotes the establishment of the so-called European Education Area within which studying and training should be accessible and profitable for people living in the EU. Spain remains the European country with the highest number of EFL motivation publications. There were only a few papers from the Americas. In South America, we see evidence of the beginnings of a CLIL push, which has the potential to lead to expanded EFL motivation research in these previously under researched areas.

Keywords: English as a foreign language, motivation, Asia, Europe, Americas

Introduction

English has become an indispensable tool for global communication. Due to the prominence of English as the lingua franca of business, academia, and tourism, the need for English as a foreign language (EFL) education in schools has become a priority worldwide.

In order to provide an international view, this paper is a result of collaboration among a team of diverse researchers from the Czech Republic, Taiwan, and the United States. The cultural diversity of this team affords a nuanced perspective into the state of English language learning motivation research on a global scale. Our focus has been on research into motivating students to learn English worldwide.

Recent reviews of literature have found that Asian countries predominate the research in the field of EFL motivation (Boo, Dörnyei & Ryan, 2015; Vonkova et al., 2020). In Europe, a vast majority of the research has come from Spain, due to the unique multilingual and multicultural landscape and widespread emphasis on CLIL (Vonkova et al., 2020). Whereas, research in the Americas is just beginning to take shape.

Research questions

Picking up where previous reviews left off, we intend to investigate whether Asian countries still lead the current research on EFL motivation, or whether other

countries have also begun to focus more on this topic. The aim of this paper is to analyze the research by geographic region to determine which countries focused on EFL motivation in 2020. We discuss potential reasons for EFL motivation research (or lack thereof) by geographic region.

Our main research questions are as follows:

(1) Which countries are currently focused on EFL motivation research?
(2) What are the potential reasons for the focus (or lack thereof) on EFL motivation research?

Methods

We used the *Web of Science* database and made a search of Social Sciences Citation Index (SSCI) articles on the topic "EFL AND motivation" published in 2020 and belonging to the category of Education and Educational Research. Specifically, we searched for the following: TOPIC: "EFL" AND "motivation". We refined the search by 'document type': ARTICLE and '*Web of Science* category': EDUCATION & EDUCATIONAL RESEARCH. The timespan was reduced to articles published in '2020'. With the 'Indexes' set to include only articles from the SSCI. Our search was performed in January 2021. The number of returned records was 61.

These 61 papers were extracted from the category 'Education & Educational Research' as indicated by the *Web of Science* records. However, due to overlap, some papers appeared in additional categories. 57.4% (n=35) of these papers overlapped with the category of 'linguistics' while the category of 'language linguistics' accounted for 21.3% (n=13). The remaining categories were 'psychology educational' with 6.6% (n=4) of the overlap results and 'computer science interdisciplinary applications' with 4.9% (n=3). In general, the significant majority of the overlapping categories were categorized in the *Web of Science* database as linguistic/language linguistic oriented studies, followed by psychology and computer science.

Results

We analyzed the country of research in all 61 papers. Specifically, we classified the papers based on region and then specified by country:

a) Eastern Asia: China (n=15, 24.6%), Taiwan (n=10, 16.4%), Hong Kong (n=4, 6.6%), South Korea (n=3, 4.9%), Japan (n=1, 1.6%);
b) Southeastern Asia: Cambodia (n=1, 1.6%), Viet Nam (n=1, 1.6%), Thailand (n=1, 1.6%), Malaysia (n=1, 1.6%);
c) Middle East: Iran (n=4, 6.6%), Turkey (n=2, 3.3%), Saudi Arabia (n=1, 1.6%), Yemen (n=1, 1.6%);
d) Europe: Spain (n=5, 8.2%), Denmark (n=2, 3.3%), Germany (n=2, 3.3%), France (n=1, 1.6%);
e) The Americas: Chile (n=2, 3.3%), Colombia (n=2, 3.3%), the United States (n=1, 1.6%);
f) Oceania: Australia (n=1, 1.6%);
g) Non-empirical (n=1, 1.6%).

The total number of countries in the above overview is 62 because one study sourced participants in both Chile and Australia.

Asia prevails, especially Eastern Asian Chinese speaking regions (Mainland China, Taiwan, and Hong Kong), which overwhelmingly produced the most EFL motivation publications. In total 47.5% (n=29) of the total papers came from these Chinese speaking regions.

In accordance with the findings discussed by Vonkova et al. (2020), Spain remains the European country with the highest number of EFL motivation publications, producing the most publications outside of Eastern Asia. We also found research papers from both Southeastern Asia and South America; these areas appear as emerging EFL research settings.

Discussion

We discuss potential reasons for the focus on EFL motivation research in different regions.

Motivation to learn EFL: research in Asia

Mainland China and Taiwan were found to be the top publishing regions in the field of research on EFL motivation. The Ministry of Education (MOE) in China has focused a great deal of attention on improving EFL learning, as demonstrated by the publication of "National English Curriculum Standards (NECS)" by the Chinese MOE in 2001. These standards aim to upgrade the quality of English learning in Chinese nine-year compulsory education and senior high school education. It is clear from a review of the "National English Curriculum Standards (NECS)" (Chinese MOE, 2001, 2011), that there are five main objectives in Chinese EFL learning. The first objective is to build up students' affect for learning English, such as their motivation, patriotism, and confidence. The second objective is to cultivate students' knowledge, awareness, and understanding of cultural issues in learning English. When discussing the language skills and language knowledge for the third and fourth objectives, the government emphasizes the key capacities of listening, speaking, reading, writing, phonetics, grammar and vocabulary. Finally, the fifth objective is to increase students' learning, thereby increasing their abilities of thinking, communication and discipline (Chinese MOE, 2001, 2011).

Taiwan has begun to adopt EFL education in recent years, since it is regarded as being a vital investment in the future of the nation. More specifically, in 2018, the Ministry of Education published a "Blueprint for Developing Taiwan into a Bilingual Nation by 2030" (Republic of China (Taiwan) MOE, 2018, 2020). As a result, Taiwan has created partnerships among schools, industries, and research centers for communication, collaboration, and interaction. For example, the MOE has invested a great deal of effort in establishing learning English, from primary to higher education, with the intended aim of developing Taiwan into a "Bilingual Nation" (Republic of China (Taiwan) MOE, 2018, 2020).

Due to the importance placed on English language learning and its association with the development of individual citizens, and on a larger scale, the national economy, EFL research has begun to include an investigation of motivation in Taiwan. There are several studies suggesting that motivation is essential for EFL learning. For example, Chang's (2020) study investigated Taiwanese EFL teachers'

beliefs and actual practices related to learners' autonomy. This study suggested some implications in terms of promoting learners' autonomy by teachers, such as developing student-centered teaching approaches, supporting autonomy with classroom practices, and designing classroom activities that encourage students' interest and motivation.

Motivation to learn EFL: research in Europe

The European Union is aware of the importance of multiculturalism and promotes the establishment of the so-called European Education Area within which studying and training should be accessible and profitable for people living in the EU. The policy of the European Commission and the European Education Area contains the recommendation that all Europeans possess proficiency in two foreign languages aside from their mother tongue (European Commission, 2019).

Eurostat's administrative statistics on education include regularly updated information about the commonly taught foreign languages within the EU. Reports from 2017 and 2020 show that at the primary and lower secondary education level (ISCED 1 and 2), English is the number one language in EU countries (Eurostat, 2020a).

As of 2018, 48% of pupils at the upper secondary education level (ISCED 3) in the EU were in line with the recommendation of the Commission and studied two or more foreign languages. For these multilingual students, English was the most frequently studied language (86.8% of the pupils), followed by French (19.4%), and German (18.3%) (Eurostat, 2020b).

Motivation to learn EFL: research in the Americas

In South America, English language learning has been previously viewed as a luxury afforded to the most socially and economically privileged groups. However, new perspectives regarding the importance of English language education, along with the implementation of national EFL focused educational policies, have begun to reshape these views. This change has had the effect of creating English language learning opportunities for people from a wider socio-economic range (Hernández-Fernández & Rojas, 2018).

In Colombia and Chile, there are now policy frameworks for implementing EFL education, including a legal foundation, standards for learning, student achievement, and teacher qualifications (Cronquist & Fiszbein, 2017). Chile's National English Strategy, as set forth in 2014 by the Piñera administration, aimed to improve the English proficiency of the Chilean population in order to propel the country into a more globally competitive position (Cronquist & Fiszbein, 2017). Due to the emphasis on EFL learning in these countries, we find the occurrence of EFL motivation research to be in line with the national policy initiatives. However, more research is needed to determine student motivation on a broader scale.

The findings of our keyword search indicate a slight increase in EFL motivation research in South America (Chile, n=2; Columbia, n=2). Vonkova et al. (2020), found only one paper from South America when performing a broader keyword search for EFL motivation publications between 2016 and March 2020. This increase in research may indicate a novel interest in EFL motivation research in Latin America. There is also a burgeoning interest in the introduction of content and

language integrated learning (CLIL) courses (Banegas, Corrales & Poole, 2020) in the region. Large scale introduction of CLIL and similar types of learning in South America could lead to an EFL motivation research boom similar to that of Spain in recent years.

In North America, we found only one study with participants from the United States. Our findings are in contrast to those of Boo, Dörnyei and Ryan (2015), who found that from 2005 until 2014, the United States was second only to Japan in the amount of language learning motivation research publications. When comparing this data, two considerations must be taken into account. First, Boo, Dörnyei and Ryan (2015) analyzed papers which concerned L2 learning motivation and were not limited to English learning specifically. Secondly, the lack of research from the U.S. in our results may be attributed to the keywords searched ('EFL AND motivation'). Using other keywords we could find more papers related to the research of motivation to learn English (see Conclusion for limitations of our study). However, the authors of this paper theorize that there is a dearth of current research into motivation to learn English in the United States.

Conclusion

We conclude that most of the research in EFL motivation comes from Chinese speaking regions including Mainland China and Taiwan. However, the emergence of EFL motivation research from Southeastern Asia and South America signal the growing interest in the topic on a broadening global scale. South America has the potential to become a prolific EFL motivation research setting if CLIL continues to increase in popularity in the same manner as it has in Spain. Although South America is a unique setting, composed of varied countries with rich cultural and political histories, policymakers in these areas can learn from the challenges, solutions, and research findings regarding motivation in European CLIL settings over the past two decades (Pimentel Siqueira, Landau & Albuquerque Paraná, 2018).

Our study has several limitations. We searched for the topics ("EFL" and "motivation") which resulted in finding papers clearly connected to EFL and motivation. However, there might be more papers related to the research area of English as a foreign language and motivation to learn. In the future research, it would be advisable to include the following keywords for searching articles from this research area: "English" and "motivation", "language" and "motivation" (see for example, Vonkova et al., 2020). Also, we limited our search to SSCI articles published in 2020, and the *Web of Science* category 'Education and Educational research'. Our research could be extended by looking for a larger time span, articles other than SSCI, and additional *Web of Science* categories. A related topic to motivation to learn English as a foreign language (EFL) is motivation to learn English as a second language (ESL), which could provide more insight into the state of current English language learning motivation research in L1 English speaking countries like the United States.

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Part 2
International Organizations and Education

Zacharias Louw de Beer & Serita Greyling

Technology as an External Determinant of the Education Systems of South Africa and India: A Comparative Study

Abstract

The framework of the education system can be defined as an effective educational environment where learners are prepared for different roles in society. It also contributes to providing for the learners' existing needs in society (Steyn et al., 2017, p. 15). The functioning of the education system can be influenced by different internal and external determinants (Steyn et al., 2017, p. 23). External determinants are external contextual factors that influence the education system such as geography, demography, and technology. In this research study, the emphasis was placed on technology as an external determinant of the education system. Technology is a very important external determinant because it influences the nature, content, and delivery of the educational programs and the curriculum. This research aimed to compare technology as an external determinant on the education systems of South Africa and India.

Keywords: technology, technology in India, technology in South Africa, external determinant, education systems

Introduction and problem statement

Technology is not only one of the most important external determinants but also impacts the way we communicate with each other. Given the advanced level of technology, and the amount of technology exposure to learners in today's climate, it is important to ensure that it will be promoted, not only in our daily lives but also at the school level. The problem with technology as an external determinant on the education system is that technology puts teachers under pressure because it changes daily, and teachers cannot always keep up with it. The traditional way of teaching and learning must be revised and adapted to improve the efficient use of information communication technology in the education system. India is one of the countries with very advanced technology. Teachers, organizations, and schools use technology in different ways to develop learners' progress across India (Southwell, 2017). India is one of the world's top countries when it comes to implementing technology, especially in teaching learners. Learners encounter technology at a very early stage. Compared to South Africa, which only uses technology in certain schools and education systems, India has better access to technology than South Africa. Each

generation learns with the type of technology with which they come into contact or at least with which they grow up. Technology offers many benefits to the school systems but the systems are not yet in place so they can be advanced or partially replaced with technology. Yet there are modern technological tools we can use to help in the current school system. Modern technology allows learners to take ownership of their teaching and learning. With this type of technology, learners can be actively involved in the teaching and learning phase and they also no longer have excuses for not being able to obtain information (Jackson, 2016). Modern technology is essential to stay competitive, it already prepares you at the school level to keep up in the professional environment (Jackson, 2016). Using digital tools can lead to lower costs in the long run. It is cheaper to buy digital textbooks online than it is to buy printed textbooks in a bookstore. Technological education can positively impact the achievement levels of academia. In today's world, young teachers are expected to use digital aids in the curriculum. Technology is part of today's children; they are raised with technology in the background. By implementing technology in school systems, it forms part of the everyday, ongoing awareness among children (Jackson, 2016).

Theoretical conceptual framework

Technology

Ramey (2013) explains that technology is a collection of information devoted to the creation of tools, processing actions, and the extraction of materials. The technological theory seeks to explain the factors that shape technological innovation, as well as the impact of technology on society and culture. Broadly speaking, technology is how people change the natural world for their purposes. Technology means the act of manufacturing, but more generally it refers to the diverse collection of processes and knowledge that people use to expand human capacity and to satisfy human needs and desires (ITEA, 2001, p. 1).

Technology in South Africa

In a country where our basic education system is deficient and the gap between the third world and the first world is very large, educational technologies such as computer skills can be very beneficial for the child at the education level, especially for those from low-income families and public schools (Political Analysis, 2018). Due to a lack of access to technology, many local schools are suffering. The gap can arise due to too few trained teachers who have the right qualifications to use technology as a medium of instruction in classrooms. There is also not the necessary finances to implement technology in all classrooms in South Africa. There is therefore a great lack of knowledge and resources.

Technology in India

India has the necessary funds and knowledge to implement technology effectively in its classrooms. Technology is used to such an extent that learners' self-study ability improves ability. India has put in place various technological models such as Virtualization and Cloud to ensure that learners in rural schools and disadvantaged schools also have access to technology (Dinesha & Agraval, 2011).

External determinants

Determinants influence the nature and functioning of the education system (Steyn et al., 2017, p. 23). The factors that influence the education system can be internal or external. For this research, there will be a specific focus on technology as an external determinant of the education system.

Education system

Steyn et al. (2017, p. 15) define the education system as "the framework for effective education to meet the real educational needs of the target group". Steyn et al. (2017, p. 23) believe that an education system consists of education administration, education policy, support service for teachings, and a structure for teaching.

Research aims and objectives

The primary research aim was to determine the nature of technology as an external determinant of the education systems of South Africa and India. The research questions were as follows:

- What are the similarities in the education system about technology as an external determinant between South Africa and India? and
- What are the differences in the education system about technology as an external determinant between South Africa and India?

Research design and method

This qualitative interpretative study employed the comparative method to identify and analyse the data generated from applicable documents. In this research, the education system of South Africa as well as that of India is compared to be able to identify the similarities and differences regarding the influence of technology as an external determinant on both countries' education systems. The following phases are described by Steyn and Wolhuter (2008, p. 1) which can be used to compare the different aspects of different education systems. It is a linear process that identifies themes, describes themes, record similarities and differences and explain the identified similarities and differences. Best practice is then highlighted and presented.

Sampling

Purposeful sampling is one of the characteristics of qualitative research. This sampling method was used. For this study, the following two BRICS countries were selected as topics for the study: South Africa and India.

Data collection

To gather the necessary data for the comparative studies, document review is the most relevant technique that was applied. For this study, different forms of human communication, official policy documents, newspapers, academic articles, books, journals, and videos will be collected to investigate and compare the influence of

technology as an external determinant on the education systems of South Africa and India.

Data analysis

The relevant documents will be examined utilising content analysis. Document analysis is a form of qualitative research in which documents are interpreted by the researcher to give voice and meaning around an assessment topic (Bowen, 2009, p. 27). Content analysis is a research method that systematically and reliably analyses the qualitative data collected in the research. Content analysis can be applied to all written forms of human communication. In this study, the different documents were identified, data were collected from the different documents and then compared with each other to obtain the most accurate information. By comparing the documents, clear similarities and differences were identified regarding the influence of technology as an external determinant on the education systems of South Africa as well as India. the following themes were identified from the data. They were Technology in schools, Technology as a teaching tool, Accessibility of technology, and Effectiveness of technology.

Findings

Technology in education

Technology in education is defined as a variety of tools that are useful to promote student learning as well as to measure individual learner behaviour. Educational technology is the study and ethical practice of e-learning. It consists of appropriate technological processes and resources to improve the learning and performance processes. Educational technology relies on a broad definition of the word "technology" which is the instruments from meaningful sources to the improved and meaningful skills to develop education (Goswami, 2014, p. 6).

India's Draft National Education Policy aims to ensure that technology is appropriately integrated into all levels of education for (i) the improvement of teaching, learning, and evaluation processes; (ii) supporting the preparation of teachers and their continuous professional development; (iii) improving educational access to disadvantaged groups; and (iv) streamlining education planning, administration, and management (MHRD, 2019, p. 43).

The Draft National Education Policy of India (MHRD, 2019, p. 43) focuses on the following points within education:

1. The National Forum for Educational Technology, which is an autonomous body, will be set up to share and consult on decisions on the induction, deployment, and use of technology within educational institutions, state, and central governments.
2. Technological integration in educational processes (Support translation, serve as pedagogical assistance, facilitate continued professional development, online courses, etc.) will be optimized through digital repositories. The optimization will also help prepare teachers to use technology so that they are qualified. It also serves as support for research. Centers of Excellence in Educational Technology will be set up to undertake research and support the use of technology.

3. The national repository for educational data will keep all records related to institutions, teachers, and students in digital form.

According to Mdlongwa (2012, p. 5), there are some administrative advantages of technology in South Africa that can also be implemented in South African education:

- Routine tasks: access to the school for learners, records are entered much faster than was done without technology (previously records would be kept in a file with pupils' school records, which had to be searched manually to look up information);
- Record keeping: through technology, records are kept orderly and reliable (manual records used in the past could be lost due to poor filing);
- Administration costs: printing costs, waste of paper, and costs of photocopying are reduced by technology;
- Information and communication within a school: due to technology, information and communication can be disseminated much faster and more efficiently through e-mails or by using PowerPoint to give presentations in class, rather than making copies of the same information for everyone.

Technology as a teaching instrument

Educational technology relies on a broad definition of the word "technology", which are the instruments from meaningful sources to improved skills in education with the help of technological instruments (Goswami, 2014, p. 6). There are different types of technologies currently used as instruments in Indian classrooms (Goswami, 2014, p. 7):

- Computer in the classroom: having a computer in the classroom is an asset to any teacher. With a computer in the classroom, teachers can demonstrate new lessons, present new materials, illustrate how to use new programs, and display new information on websites;
- Class blogs: there are a variety of Web 2.0 tools currently implemented in the classrooms. Blogs enable students to have easier dialogues, blogs are also available for students to keep diary entries and to share their thoughts. Blogs help students to present their ideas and to complete assignments;
- Wireless microphones: noisy classrooms are a daily problem, with the help of microphones students can hear their teachers more clearly. Students learn better if they can hear the teacher clearly;
- Mobile devices: mobile devices such as tablets or smartphones can be used to expand the field of experience of learners and allow professors to give feedback to learners;
- Interactive whiteboards: wit interactive whiteboard that 'n provides touch control for computer applications. It enhances the classroom experience by showing everything on a computer screen. Not only does it help visual learning, but it is interactive so that students can draw, write or manipulate pictures on the interactive whiteboard;
- Digital video on demand: digital video eliminates the need for hard copies in the classroom and sets up teachers and students able to instantly access video clips and not ensure that there is no need to use public internet;

- Online media: streamed video sites can be used to enhance a classroom lesson;
- Online study tools: the tools that motivate the study by making the study more fun or personal for the student;
- Digital games: the field of educational games and serious games has grown significantly over the last few years. The digital games are offered as tools for the classroom and they offer very positive feedback including higher motivation for students.

These are just a few of the types of technological tools used in India. There are many other tools used depending on the local school board and the funds available.

According to the National Integrated ICT Policy White Paper (RSA, 2016, p. 109) of South Africa, digital and mobile infrastructure, as well as technologies, are tools to enable all citizens to obtain information and services from a variety of sources within a short time.

ICT is relevant in education as a way to support a process of teaching and learning and is best used to support a value creation process. It is not a focus in itself. Besides, technology has a separate and distinct role in enabling the management and governance of education. Reflection on the appropriate role of technology in teaching is therefore essential, as it is instrumental in defining a clear objective, and as such in directing both macro-level strategy and micro-level tactics and implementation.

- Instructive approaches: teachers integrate technology in a passive and teacher-centered way (teaching technology);
- Cognitive approaches: the use of technology as a mind tool (e.g. the use of technology to represent authentic contexts and activities in learning – learning with technology);
- Mediative approaches: the use of technology to mediate the construction of knowledge (e.g. the use of tools to solve problems).

Accessibility of technology

In India, technology makes education at every level affordable by offering courses and content for free or at a very reasonable cost. The number of internet users in rural areas is nearly 293 million. In 2019, India's internet user base estimated at approximately 627 million. Education will be more accessible and affordable for the masses of technology users in the country made available through the internet through high speed and low-cost devices. The biggest beneficiaries of the easier access to academic learning and data were students from level 2 and level 3 cities who no longer have to rely on institutes in the area. With the advent of this digital age, education is no longer limited to the four walls of a classroom. An interactive platform ensures that a student can understand, share, discuss and practice a lot in the same way as he/she would do in a real-time study class.

The Information and Communication Technology industry in South Africa's growth perspective, as well as the accessibility of technology, is supported by the following sectoral and national policy objectives (RSA, 2016, p. 141):

- Defining the ICT sector and its value chain;
- Position the ICT sector in the industrialization and reindustrialisation of South Africa;

- Stimulate the demand for ICT goods and services;
- Important government interventions such as the development and regulation of ICT policy, research, and development, funding, efforts to promote direct local and foreign investment;
- The coordination between important state institutions as well as to strengthen the private sector;
- Promoting research and development, innovation, and local manufacturing;
- The introduction of a new skills development dispensation.

Efficiency of technology

The effective use of ICT and the implementation of personal education programs in India can ensure significant changes in the learning process in schools and it can subsequently lead to a better education system. By focusing on both the training of teachers for the effective use of ICT, as well as the implementation of programs that offer personal education to students, significant improvements in the learning process and the test results can be ensured.

The Department of Telecommunications and Postal Services in South Africa is, among other things, involved in reforming the country's skills development agenda in line with the work landscape of the country's future. This department is also involved in the prioritisation of digital skills in the country (RSA, 2016, p. 43). The education authorities must be aware of the important role of ICT in our lives, especially in educational activities, and must be sufficient to implement the strategies to empower ICT to facilitate the teaching and learning process in the classroom support.

Conclusion

Technology can reduce the tremendous effort involved in collecting printed books and magazines to focus students on a more important process, knowledge acquisition. Technology can further represent education in ways that help students understand the latest concepts and ideas. Technology in teaching also enables teachers to integrate project-based learning. Under the guidance of effective teachers, students at different levels can use these tools to construct knowledge and develop skills needed in modern society such as presentation skills and analytical skills.

The use of ICT may not be the cure for all the problems currently in the education authorities. There are still many challenges facing our country with the implementation and introduction of technology in schools. It is especially based in today's global world because our economy has changed so much. The country is going to have to look more dynamically at individuals who can show up with solutions to take our country to better heights. The use of ICT in South African schools will not only improve learning and teaching in education in the long run but will also promote the advancement of knowledge across the country for all learners. As a result, South Africa is still far behind India in terms of technology as an external determinant, but this does not stop the country from broadening research in this field.

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International Involvement and Education in South Africa: From Hope to Disenchantment

Abstract

Since the 1960s and before the dramatic announcement of the release of Nelson Mandela on 2 February 1990 (signalling the end of apartheid and the crossing of the proverbial Rubicon (Stone, 2014, p. 3)), the international community assisted the African National Congress (ANC) in its struggle against apartheid and put crucial pressure on the state through economic and other sanctions (Marx, 1992, p. 175). There was, however, abundant economic and other support for the ANC, the liberation organisation widely regarded as the legitimate voice of South Africa's people (Marx, 1992, p. 186). The support was intended to help the ANC to take over and transform all aspects of the government of South Africa and gave the ANC people hope that they could escape the oppression of *apartheid*.

When the dismantling of the apartheid system began, international concern about South Africa started disappearing (Marx, 1992, p. 175). The need for intervention was "now driven by more mixed and uncertain motivations" Marx (1992, p. 175) like development needs and complicated access to financial and other assistance. Despite all the aid, the South African school education system has been performing poorly since the advent of democracy (comparable to the gaining of independence of other African countries). Hope springing from international aid was replaced by a feeling of disenchantment. Apartheid has undoubtedly added to the constraints to educational development and advancement but this paper will also explore the possibility that international aid may have contributed to the apparent failure of the system.

Keywords: Rubicon, development, non-racial and democratic system, disenchantment, international aid, constraints to educational development, under-performance of officials, sanctions

Introduction

South Africa is characterised by two momentous events. The first was the release of Nelson Mandela in 1990, which culminated in 1994 when the African National Congress (ANC) replaced the ruling National Party in a peaceful transition. This event was comparable to independence (*uhuru*) in postcolonial Africa. Earlier, in 1948, the National Party became the ruling party in South Africa and became the subject of massive international pressure since the 1960s to reform its repulsive *apartheid* policy. This policy was and is still being regarded as the cause of all South Africa's problems and is now also linked erroneously to 1652 when the Dutch East African Company (DEAC) placed employees in the Cape. Pre-1990, the ANC engaged in a struggle with the state to achieve a democratic and non-racial government in South Africa (with a matching education system).

In this paper, I explore international aid and involvement in South Africa's school education system during these two epochs to identify successes and flaws of the interventions.

The playing field for both epochs: the diversity of South Africa

Semper eadem et aliud (Still the same, but different) (Stone, 2014, p. 259)

The Latin adage above suggests that international intervention during the two periods could be similar. Although 1994 brought about significant changes in the legislature, the demographics of educational institutions and the respective numbers of white and black government officials, many things did not change (especially for the poorest of the population).

The perception then that aid was going to a third-world country that consisted of a large black majority and a small white minority was an oversimplification of the country's diversity. The comments of Stone (2014), Park (2019), Lea (2020), Marx (1992), Isaacs (2021) and Nkomo (1989) below present a better picture of the diversity of the nature and fabric of South Africa that challenged international aid.

Stone (2014, p. 21) observes that:

> *Our history shows two main lines: that of the **Afro-African** and that of the **Euro-African*** (emphasis added). *There is the story of the Afrikaner … from the highly developed Europe …; also the British influence. And then, obviously, the story of the disadvantaged, black continent, Africa, and its black Africans … and the battle/struggle between white and black for equal rights.* (Translation by the author).

Czada (2013, p. 6) quotes Neville Alexander's (2001) metaphor of the *Gariep* (the great river) which changes Stone's two "lines" into three "streams" by referring to:

> *… the historical fact that South African society, …, has come about through the flowing together—mostly violently, sometimes in a relatively peaceful manner—of three main "tributaries"—carrying different cultural traditions, practices, customs, beliefs, etc. These currents or streams are the African, the European and the Asian.*

Park (2019, p. xi) comments on a different kind of "trilemma" for South Africa namely to effect globalisation, democracy and national self-determination. For this to be accomplished, an African country needs "a strong social fabric, well-functioning institutions, … sound economic planning and management, … good governance, accountability, …" to make the best use of international exchanges (Park, 2019, p. x), all these requirements being indisputably absent in South Africa after 1994.

Park (2019, p. 15) mentions that the attractiveness of South Africa and other African countries for development aid can be spoiled by the fact that "Sub-Saharan African countries do not have neighbouring countries to use as benchmarks … for … development" (p. viii). Lea (2020) adds to Park's ideas and mentions "ill-conceived and economically unsound" aid programmes and "reckless spending" on "extravagant projects" in these countries as deterrents to international development assistance. One could add large-scale private and public corruption to these factors.

Marx (1992, p. 188) referred to the severe problem of South Africa's "limited absorptive capacity" indicating there were few organisations "able to absorb funds and to function effectively on a large scale". Isaacs (2021) observes that South African reports on intervention projects tend to contain proof of money expended but not of services rendered or of the effect and quality of services, indicating a lack of accountability.

South Africa has 11 official languages, 4 main racial groups and even more ethnic groups. Wages, racial, gender and educational inequality dominates the scene together with high unemployment rates (30.8% on average, 50% plus for youth) (Isaacs, 2021). Senior management positions in all organisations are heavily dominated by whites.

South Africa's uniqueness in postcolonial Africa

In South Africa, international development engagement before 1994 ("independence") was not with a state but with a political liberation organisation (the ANC). Sanctions barred government (and considerable white experience and expertise) from participating in negotiations regarding foreign aid. Decolonisation played no role in South Africa, an independent republic in 1994.

President de Klerk's speech in Parliament in February 1990 was remarkable: a government in power voluntarily relinquishing sole control of a state. This led to the termination of a struggle between different elements of a nation and changed the aim of aid from liberation to development.

Aid before 1994

There was sympathy with, and support for black South African students overseas as apartheid "purposefully created tremendous impediments to the advancement of the majority of South Africans …" (Marx, 1992, p. 175). The sympathy was extended to all black South Africans. The US Agency for International Development (AID) (among the biggest donors) channelled $40m into human resource development, education and community leadership programmes (Marx, 1992, p. 181). In 1992, 60% of an amount of $80m was earmarked for education. The European Commission spent approximately R200m per year on bursaries and research but international agencies remained reluctant "to establish ties with the … regime still in power" (Marx, 1992, p. 182). They did not want to be branded as apartheid sympathisers.

After the Soweto uprisings in 1976, there was "a proliferation" of scholarship assistance to black South Africans in Europe, Britain, Canada and the United States (Nkomo, 1989, pp. 1-3). Most of the assistance came from private organisations. In 1987, 4 790 black South Africans were studying in Britain and the USA (Nkomo, 1989, p. 9), still a miniscule part of the population.

What Nkomo (1989, p. 12) said about the "magnitude of the need" which exceeded the "South African regime's capacity" still rings true and partially explains why the hopes raised by pre-1994 aid turned into disillusionment. Nkomo (1989, p. 13) was concerned that foreign aid tended to produce a "cadre of leaders whose conceptual framework and operational paradigms conform to the world view and needs" of the donor countries and not those of their native countries.

The pre-1994 era: main impressions

Marx (1992) and Nkomo (1989) provided indications of how many students benefitted from scholarships and how much money was spent on scholarship grants for black students and other aid. Because aid was mainly routed to and through a

banned organisation (the ANC), it is likely that the authors were not aware of all exchanges between the ANC and donors and prospective donors. There is no detailed information on what aid was made available in this era and what the financial implications were.

Aid after 1994: unfulfilled promises

Circumstances in the country changed markedly as more schools were built and a new legislative regime was developed (DOE, p. 2001). There was a shift in "resources in education" (Van der Berg & Hofmeyr, 2018, p. 2) to a pro-poor policy.

After 1994, the floodgates of foreign aid to education were expected to open but aid faded instead. Foreign donors still struggled to find public or private agencies capable of managing large-scale interventions in teaching and learning and infrastructure-linked projects. The DOE (2001, p. 64) observed that, after the 1994 elections, "international donors had largely shifted their focus away from civil society" to the new government. Overseas official Development Assistance (ODA) peaked at R3.8b in 1997 but has declined since 1999 and the decline was attributed to "the international community's growing confidence about South Africa's ability to govern and fund its own programmes and policies".

Engaging with donors

Donors interacted predominantly with the government of the country and not private institutions. A "flood of dignitaries" sought contact with South Africa and the need arose to coordinate funding initiatives Marx (1992, p. 187). This need required a "massive training initiative" to build capacity to counter the lack of "absorptive capacity" (Marx, 1992, p. 189) so that the country could make optimal use of available assistance.

International agreements

On 5 September 2017, the DBE (DBE, 2017) held a briefing on its international agreements. The "exchange of delegations and experts, cooperation between education institutions, exchange of information and sharing of best practice in different subject areas of interest" formed the agenda of the briefing.

Bilateral agreements

In 2013, South Africa and the People's Republic of China entered into an agreement to promote the teaching of Mandarin in South African schools. A memorandum of understanding (MOU) between the DBE and the Embassy of France in 2016 dealt with the teaching of a nutrition programme and of French in schools and in terms of an MOU (2016) with the Republic of South Korea six volunteer teachers in scarce subjects were dispatched to South Africa.

A British Council-DBE declaration of intent in 2014 led to capacity-building workshops for 900 teachers and subject advisors in the field of English language. An agreement with the Flemish Association for Development, Cooperation and Technical Assistance (2014) addressed learning outcomes in primary education.

20 mathematics and science subject specialists were deployed in South Africa in terms of an agreement with Cuba in 2016. The Japan International Cooperation

Agency (JICS) offered periodic training for mathematics and science subject specialists in terms of an intergovernmental agreement of 2011. The DBE also engaged with Germany, the UK, Finland, Turkey and the World Bank – mostly about curriculum matters like the UK and Flemish agreements.

The participants in the briefing asked a pertinent question about why there was no feedback on agreements and their benefits for the DBE. Departmental officials at the briefing could not provide clear answers.

The blueprint document for education after 1994, the White Paper on Education and Training of 1995 (White Paper) (Department of Education, 1995) surprisingly did not explicitly recognise foreign assistance (the existence of which was widely recognised in the country) in the development of this document. It is, however, clear that the ANC consulted international experts about among others Outcomes-based Education (OBE), school governance systems and teacher rights.

Activities of the DOE

The DOE's policy framework on partnership (DOE, 2001, p. 46) supported the assumption that a high-quality "education sector cannot be built by government alone" and that *partnerships among others with international partners were essential* (emphasis added).

The DOE (2001, p. 47) indicated that it cooperated with:

> *... the United Nations system and with numerous donors to improve access to ... education. Development co-operation partners such as DANIDA, USAID, SIDA, CIDA, DfID (UK), the Netherlands, Belgium, Irish Aid, the Finnish government, and the European Union, ...*

It is important to note that aid included technical (presumably curricular) and financial assistance to the national and provincial departments of education.

25-year progress review

The DOE (2019) published a progress review report which also conveys information about international organisations and countries' involvement in the development of South African education.

The White Paper (DOE, 1995, p. 36) acknowledged the use of international instruments in the design and establishment of the new education system. These instruments included conventions dealing with the right to education and children's rights and the UNESCO Convention Against Discrimination in Education (1960). The White Paper also announced that the DOE would explore the implications of other documents such as the World Declaration on Education for All (1990), the Charter on the Rights and Welfare of the African Child (1992) and other related documents.

This indirect international assistance noticeably affected the essence of educational rights in South Africa.

Factors impeding international involvement and development

South Africa could have made better use of international involvement but factors such as the following impeded the success of international aid and involvement:

- In terms of human resources, official "appointments" in the form of "cadre deployments" as rewards for loyalty to the ANC during the struggle instead of appointment on merit made increased donors' difficulty to find effective functionaries and project partners (Bosman, 2019, pp. 9-10; Stone, 2014, pp. 254-260; Nkomo, 2021).
- Cadre deployment violates Section 197(3) of the Constitution of 1996 (Republic of South Africa, 1996) which provides that no "employee of the public service may be favoured or prejudiced only because that person supports a particular political party or cause". The state has been ignoring its own Constitution for close to 17 years and this must lead to donor misgivings about aid.
- The absence of effective human resources and other systems "to hold aid recipients and government accountable for how the money is spent" (Lea, 2020) resulted in donors' reluctance to provide aid. There was also a loss of managerial expertise in the upper echelons of the education hierarchy because of voluntary severance packages intended to equalise educational spending (Stone, 2014, p. 260).
- "[t]he majority of the populace did not benefit from both the aid and economic growth that followed" and did not encourage recipients and international agencies' involvement (Park, 2019, p. 20).
- South Africa's creditworthiness rating by major international credit-rating agencies has fallen to junk status, with obvious implications for investment in South Africa.

Conclusion

I used the work of authors like Park (2019), Nkomo (2021), Marx (1992) and Lea (2020) to link the ANC and the people's hope for aid provided to them in the struggle against the apartheid regime before 1994 ("independence") and to connect disenchantment to the outcome of the new dispensation in the post-1994 period.

SA needed (still needs and will continue to need) aid. It did receive assistance in various forms but the exact nature, scope and success of the aid cannot easily be determined from available sources. There was probably more aid than what can be stated with confidence. An obvious lack of success has been observed by among others Nkomo (2021) who comments that the system still displays "multiple educational deficits: high failure and dropout rates; abysmal educational facilities, … and generally high levels of illiteracy and innumeracy".

The authors above all suggest that foreign aid may be partially to blame for the poor results of aid and four of their observations stand out:

1) only a small fraction of available aid reached its aim,
2) mismanagement, excessive administrative costs and abuse of money,
3) a significant part of the money served the interests of the donor countries or organisations, and
4) corruption, theft and mismanagement eroded the amount of aid available.

The absence of "organizations capable of utilizing large amounts of funds effectively" (Marx, 1992, p. 181) and the argument of Lea (2020) that "… foreign aid … is out there to serve the interest of … multi-national corporations. There are

small amounts of aid that really go to helping people ...” make one understand the disappointment and the failure to some extent. One could add Park’s (2019, p. 37) opinion that that foreign aid fuelled the “dependency syndrome” and weakened “African states’ governance or administrative capacity” and “legitimacy” as factors impeding the success of donor and other aid. Receivers of aid could feel abused and that their dignity and worth were violated.

Malherbe “estimated that it would take two generations (about 60 years) to undo the damage and achieve parity …” (Nkomo, 2021). South Africa can build a quality school education system largely on its own but will need persistence, finances, and sound management and planning. The suggestions that “the DBE should focus its attention, resources and energy on a single unifying goal …” (Van der Berg & Hofmeyr, 2018, p. 21) and that “an unrelenting campaign” that puts “education on the same pedestal as the economy” should be launched (Nkomo, 2021) could be essential components of such a project.

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Special Education in BRICS: A Comparative Overview

Abstract

Many discussions have taken place around the issue of the special needs of learners, special schools and inclusivity. UNESCO argues that inclusive education will accommodate all children, regardless of their physical, intellectual, social, emotional, linguistic or other conditions. This would include disabled and gifted children, street and working children, children from remote or nomadic populations, children from linguistic, ethnic or cultural minorities and children from other disadvantaged areas or groups. In inclusive education, the diverse needs of students would be recognised and responded to, accommodating different styles and rates of learning and ensuring quality education to all. However, globally, the views of countries on inclusivity differ, and setting up schools for learners with special needs is often preferred. The overall aim of this study is to give an overview of the perspectives of the BRICS countries regarding learners with special needs, special schools and inclusivity. A document analysis was done of both printed and electronic (computer-based and Internet-transmitted) material. The views of the BRICS countries on learners with special needs, special schools and inclusivity differ.

Keywords: BRICS, inclusive education, special education

Introduction

The main purpose of any education system is to support future citizens in obtaining a bright future and to provide the necessary skills to be well-educated in a career. Education, per se, is a key to life, knowledge, self-confidence and self-respect (Bhardwaj, 2016). Furthermore, education enables individuals to interpret things and prepare them for life. For this reason, every child, including those with disabilities, should be given the opportunity to receive an education, as education is a fundamental human right. During the World Education Forum in Dakar, the Dakar Framework Education for All was established. This UNESCO education objective provided goals to address the basic learning needs of children (UNESCO, 2000). With this initiative, the importance of international cooperation to improve education globally has been emphasised once again. Subsequently, Brazil, the Russian Federation, India, China and South Africa (BRICS) are striving for collaboration to improve policies, activities and structures in education. The need for quality education has become a priority for BRICS. In addition, reforming education, promoting equity in education, fostering quality education and organising student exchanges all form part of the pledge.

Special education

The goal of special education is to provide an opportunity for specialised education to learners with disabilities. However, when comparing special education globally, there is a clear difference in how special education is viewed, especially in

the BRICS countries (Pullen & Hallahan, 2015, p. 37). Several studies have contributed to the body of scholarship about special schools which include characteristics of learners with disabilities, learning difficulties and memory difficulties as disabilities and the controversy about the accommodation of learners with abilities.

BRICS

"BRICS" is the acronym coined for an association of five major emerging national economies – Brazil, Russia, India, China and South Africa. Originally, the first four were named "BRIC" (or "the BRICs"), before the induction of South Africa in 2010. The BRICS members are known for their significant influence on regional affairs, and all of them are members of G20. All of the BRICS members recognise that they need to improve the quality of education in their countries significantly if learners are to succeed in life and work and contribute positively to the economy (UNESCO, 2015, p. 10). Achieving equitable economic growth and sustainable development will require further investment in education. In this regard, "Brazil, China, India and South Africa need to achieve universal primary and secondary education; reduce inequalities in attainment (the number of years children spend in school), and raise learning achievement. Countries also need to place increased emphasis on expanding good quality early childhood care and education programmes" (UNESCO, 2015, p. 11).

Methodology

The study was employed in a comparative design, where the researcher investigated whether there were differences between the various BRICS countries in their approach to schools with special needs. The purpose of this comparative study was to investigate the relationship of one variable to another by examining whether the value of the dependent variable in one group is different from the value of the dependent variable in the other group. In this study, special education in the BRICS countries is compared based on descriptive data. The significance of this comparative study lies in the description, understanding, interpretation, explanation, evaluation, application, motivation and furthering of the philanthropic ideal. A systematic document analysis of both printed and electronic (computer-based and Internet-transmitted) material was done, with a focus on content analysis. Researchers regard content analysis as a flexible method for analysing text data. The specific type of content analysis approach chosen by a researcher varies with the theoretical and substantive interests of the researcher and the problem being studied.

Discussion

In 2000, at the World Education Forum in Dakar, Senegal, 164 governments agreed on the Dakar Framework for Action, Education for All: Meeting Collective Commitments, launching an ambitious agenda to reach six wide-ranging education goals by 2015 (UNESCO, 2015). The aims of UNESCO (2015) were to expand and improve comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children, to ensure that by 2015, all children,

especially girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality, to ensure that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes and to improve all aspects of the quality of education and ensure the excellence of all so that recognised and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills. In addition, one of the aims of BRICS is to accelerate the realisation of the Education for All objectives, which includes vulnerable and poor children. During the ninth summit of BRICS (2015), an outcome was the acknowledgement that the BRICS community aspires to ensure inclusive and quality education for all and to promote lifelong learning. It was acknowledged that all member states face common challenges in promoting educational equity and accessibility (BRICS, 2015).

Special needs education

"Special education" is a broad term used by the law to describe specially designed instruction that meets the unique needs of a child who has a disability (Hans, 2015, p. 12). Specially designed instruction means adapting, as appropriate to the needs of an eligible child under this part, the content, methodology or delivery of instruction and addressing the unique needs of the child that result from the child's disability. The goal of special education is to provide an opportunity for specialised education to learners with disabilities. However, when comparing special education globally, there is a clear difference in how special education is viewed, especially in the BRICS countries.

Special education in the BRICS countries

Brazil

Special needs facilities for children with learning difficulties or physical disabilities in Brazil are limited compared to other developed countries. Going back in history, it is clear that a lack of effort to establish institutions for the handicapped was experienced. The first school for individuals with physical impairment was established in the 1600s (Kiru, 2018). Following this initiative, the first school for blind children was established in 1954. Hereafter, special education services in Brazil were provided in special schools. After 2003, school inclusion as a guideline that integrated a policy for the Brazilian state to minimise the mechanisms of school selectivity and the precariousness of schooling directed to people with disabilities was affirmed. The national policy on special education in the perspective of inclusive education of 2008 (BRASIL, 2008) provided guidelines on the expansion of schooling for students with disabilities. In this policy, the focus falls on schooling for *all* students (Baptista, 2019). In addition, specialised support, such as CNE Resolution No. 04/2009 (BRASIL, 2008), which ensured the right of access to ordinary schools for students with disabilities, such as Decree No. 6949/2009 (BRASIL, 2008), which has constitutional amendment effects (Baptista, 2019), was affirmed. The Brazilian National Plan of Rights of Persons with Disabilities covers

four areas: access to education, health care, social inclusion and accessibility (Baptista, 2019; Borges & De Freitas Compos, 2016).

Russia

The first inclusive educational institutions appeared in Russia on the turn of the 1980s and 1990s. Then, in 2008 and 2009, the Ministry of Education and Science of the Russian Federation implemented a model of inclusive education in educational institutions on an experimental basis. The implementation of inclusive education in Russia is done in accordance with the Constitution of the Russian Federation, the Federal Law on Education and the Federal Law on Social Protection of Disabled Persons in the Russian Federation and is regulated by the Convention on the Rights of the Child and Protocol No. 1 of the European Convention on Human Rights and Fundamental Freedoms. In April 2010, the Moscow City Duma adopted the Law on Education of Persons with Disabilities in the City of Moscow or Moscow City Law No. 16 (Valeeva, 2015). The new law guarantees persons with disabilities the implementation of their constitutional right to education and the creation of the conditions necessary for them to get education according to their individual needs. In Moscow, there are currently more than 1 500 schools, of which 50 are implementing the programme of inclusive education (Valeeva, 2015).

Inclusive policies and practices in different regions of Russia vary. In some instances, the government provides education for disabled people only in primary schools. In addition, the accessibility of schools sometimes is an obstacle. Other obstacles with regard to the architectural environment, vital facilities, modern technology and public transport also occur in Russia (Valeeva, 2015).

India

In the year 2000, there were only 2 500 special schools in India to cater to the needs of almost 50 million children with disabilities. Currently, millions of children with disabilities do not have any place to receive education or related services. In many special schools, children with various disabilities, such as autism, intellectual disability, cerebral palsy, hearing impairment and learning disability, are all receiving education in the same classroom. Most of the special schools charge a monthly fee or require an initial donation for admission. These types of requirements make many special schools inaccessible to the poor. The result is that millions of children with disabilities do not receive any education or related services (Antony, 2013).

Although it seems as if special education in India is being neglected, the government of India has enacted four special statutes for people with disabilities: the Mental Health Act of 1987; the Rehabilitation Council of India Act of 1992; the Persons with Disabilities Act (PWD Act) of 1995; and the National Trust for Welfare of Persons with Autism, Cerebral Palsy, Mental Retardation and Multiple Disabilities Act of 1999. Of the four laws listed, the PWD Act protects the educational rights of people with disabilities (Antony, 2013, p. 6). In addition, six sections of the PWD Act (Sections 26-31) provide specific protection for children with disabilities, which includes government responsibilities, local authorities, nongovernmental organisations, teacher training, alternate facilities and public laws. Recent initiatives by the central government have made it incumbent on all schools

falling under state government jurisdiction to move beyond a separate, parallel structure towards a unified, inclusive system of education that serves all students together.

China

Europeans and Americans established the earliest special education schools in China in the 19th century, and the delivery model was entirely restricted to separate schools (Deng & Zhu, 2016). Thereafter, a new special education service delivery model was advocated in 1988. A three-tier service delivery system, consisting of an array of placement options for special schools, special classes and learning in regular classrooms (LRC), with the LRC as the major initiative, to serve students with disabilities was grafted into the Chinese educational system, resembling the continuum model adopted in the United States. The number of special classes rapidly increased in the 1990s and then dropped drastically during the 21st century. About 6 148 special classes were established in 1998, reaching the peak of expansion, but declined very fast to 684 in the year 2008 (China Education and Research Network, 2008). Many special classes were closed, and a few of them were transferred to resource classrooms for students with disabilities to study in regular schools (Deng & Zhu, 2016). According to the China Ministry of Education (cited in Huang, 2012), there were 1 706 special education schools across the country, with 425 613 students, at the end of 2010. The China Disabled Persons' Federation also cited 86 000 community therapy centres with 314 000 therapists in 1 823 cities across China in 2011 (Huang, 2012).

South Africa

The provision of education for learners with disabilities has been part of the development of an inclusive education system that can be traced back to the founding document of the nation, the Constitution of the Republic of South Africa, Act 108 of 1996 (Department of Education, 2001). The framework for an inclusive education system is laid out in Education White Paper 6 on Special Needs Education: Building an Inclusive Education and Training System (Department of Education, 2001). The scope of this policy is broad, as it attempts to address the diverse needs of all learners who experience barriers to learning. Currently, in South Africa, education for students with special needs is provided in special schools, full-service schools and regular schools.

South Africa has various special schools in different provinces. The Transoranje Institute for Special Education was founded on 13 March 1947. The aim was to start a school for deaf children in the north. The first school to be established, on 16 August 1954, was Transoranje School for the Deaf. It became clear, however, that the Institute would also have to establish schools for children with other disabilities. The current Institute schools are the following: Transoranje School for the Deaf, Prinshof School for the Visually Impaired, Sonitus School for the Hearing Impaired, Transvalia School for Epilepsy and Learning Disabilities and Martie du Plessis High School for the Cerebral Palsied. Current learner count of the various Institute schools is 1 858.

Conclusion

It is clear that although the five BRICS countries more or less have a special education system in place, there is a common factor experienced by parents in the countries, namely that they struggle with their children who have disabilities. Furthermore, finances play a major role. In most cases, parents do not have the necessary funds to send their children to special schools. However, children with special needs must not be left behind. Therefore, it is the responsibility of every education department in the BRICS countries to ensure that all learners are accommodated, whether in special schools or through inclusivity.

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Responding to Twenty-first Century Societal Trends through Nurturing Globally Competent Citizens

Abstract

Higher education institutions play an active role in addressing and responding to twenty-first century societal trends. The two main factors, which have transformed the way we live and work are globalization and technological advancements. Consequently, global competence became imperative in twenty-first century. As evident from scholarly literature, global competency is the currency in today's world, which includes the capacity to view life from different perspectives, to value diversity, to engage in multicultural interactions and to have skills to respectfully navigate in the complex inter-connected world. Higher education has an important role to play in nurturing globally competent citizens with a critical worldview and the above-mentioned abilities. Considering the importance of this topic and the scarcity of literature grounded in South African context, the scope of this paper is to explore the development of globally competent citizens in selected South African higher education institutions. Employing document analysis method, this qualitative project investigated to what extent higher education institutions positioned themselves to address twenty-first century societal trends. Special attention was paid to competencies of globally competent citizens, educators' role in developing global competence and HEIs response to twenty-first century trends. Based on the findings, recommendations are provided on how higher education institutions may maximize development of globally competent citizens.

Keywords: higher education, global competence, globally competent citizens, twenty-first century trends

Introduction

The twenty-first century brought many changes and with them opportunities and challenges. We learn from literature that South African higher education institutions (HEIs) are not effectively adapting to these changes, hence graduates are not developing global competencies required to thrive in the twenty-first century. Consequently, detrimental social and economic ramifications follow. Reade et al. (2013) warn that this is problematic because individuals who do not possess the knowledge, skills and attitudes required to be globally competent will hinder their own employability, leadership skills and their ability to make a positive impact on the world.

Globalisation as a twenty-first century trend is not only creating new realities, it is also creating new rules in which to prosper (financially, socially, and academically). Thriving in new realities and under new rules will depend on the individual's ability to understand and adapt to political, social, cultural, and economic situations. OCED (2019) reported that globalisation has a major impact on other twenty-first century trends; as a result, it is imperative for education systems and globalisation to be linked. This can be accomplished by the development of

learners' global competencies through their engagement in interpreting local, global, and intercultural issues as well as promoting values and attitudes that encourage sustainable consumption of resources. Learners need to understand that their personal engagements and decisions of their countries impact other places, which Jooste and Heleta (2017) described as being globally literate.

Todd (2017) defined global competence as the ability to understand and react to global trends. This includes having the ability to scrutinize the world, acknowledge own views as well as to convey and act upon own ideas, perspectives, and research. Hughes (2014) described global competence as a conscious attempt to understanding cultural norms and expectations of different individuals. Globally competent individuals are informed about current global trends and issues, have their own perspectives, and can communicate with different individuals (Kopish, Shahri & Amira, 2019). It is important to clarify that developing globally competent citizens is essential for each nation not only because such citizens can be employed globally but because such citizens can function effectively also in their own, often diverse nation. For instance, South Africa is one of the most diverse and complex nations with 11 official languages.

As evident in the scholarly literature, education should be an essential tool that society employs to regulate and direct change. Therefore, the education system, its structure, curriculum, and academic functions should meet global standards. Steyn and Wolhuter (2014) argue that South Africa's HEIs need to meet global standards especially in terms of employability, sustainability, and cross-cultural engagement. According to Tjønneland (2017), however, achieving global standards may be problematic for South African HEIs since universities have experienced several protests calling for free tertiary education and decolonisation of HEIs curriculum and structures. Tjønneland (2017) argued that the associated strikes are a response to the failure of HEIs to transform and change. In addition to the protests, other social challenges such as inequalities, discrimination, high unemployment rates and poverty also constitute obstacles in achieving global standards. One way to respond to the above-mentioned changes and challenges is to develop citizens who are globally competent (Programme for International Student Assessment, 2018). Global competence can ensure employability, thus reduce unemployment, poverty and poor economic growth. Global competence encourages actions that are respectful and sustainable, which in turn have potential to reduce discrimination, promote cross cultural engagement and sustainability.

Employing document analysis method, the purpose of this qualitative research project was to explore the development of globally competent citizens in South African HEIs. The overall project investigated to what extent South African HEIs positioned themselves to address twenty-first century societal trends. Considering the length constraints, this paper will address the following: competencies of globally competent citizens, educators' role in developing global competence, and HEIs response to twenty-first century trends.

Research methodology

This qualitative research study employed document analysis method. Bowen (2009) described a document analysis as a methodical process that entails reviewing, examining, and evaluating documents to gain understanding and meaning.

Furthermore, document analysis is used to supplement other research methods, but can also be effective as an individual method. This research study employed purposeful sampling since a random selection of documents may have produced inconclusive and inconsistent results. Documents were purposively selected from the top five universities in South Africa according to their relevance, authenticity, and credibility (Nieuwenhuis, 2020). It is also essential to note that to undertake a document analysis, applicable data must be accessible (Yavuz, 2016). All selected documents were freely available on the internet and the universities' official website. The top universities were selected according to the QS (Quacquarelli Symonds) BRICS (Brazil, Russia, India, China, and South Africa) University Rankings 2019. The QS BRICS ranking was established in 2013 with the aim of highlighting prominent universities in the five major evolving economies of the BRICS countries. Furthermore, the QS BRICS ranking system was used for this research study because QS specializes in the analysis of HEIs and is trusted globally (Lumpur, 2019). To locate relevant documents, the researcher ran searches for specific keywords within the universities' official websites assuming that these institutions would be well versed in development of globally competent citizens. In addition, complimentary documents were selected to address the research questions. Initially, 54 documents were collected from the years 2010-2020 then 25 documents were selected for analysis in this article. The analysed documents can be classified as public records and physical evidence (Triad, 2016).

A detailed and systematic manual colour coding process of the text was followed to code the 25 documents that were selected for the purpose of this research study. The researcher initiated the coding process with open coding, followed by axial coding and continued with selective coding. Through the systematic coding process, a total of 61 open codes were identified, which involved breaking up the data into relevant parts. Next, axial coding occurred by examining the relationship between concepts and categories created during open coding (Kaiser & Presmeg, 2016). Axial codes were created using the words core category, casual conditions, context, intervening strategy and actions and consequences as headings. Then, through revisiting and refining the open and axial codes, twelve selective codes emerged, which were then categorized into three main themes that informed this paper.

Findings

The results for each theme are reported collectively based on all analyzed documents. It was not our intention to compare the effectiveness of each institution against the other but rather to evaluate overall situation and focus on an effective way forward.

Abilities of globally competent citizens

As per collective description in various documents, globally competent citizens possess the ability to respond to employability, technology, globalisation, sustainability, climate change, the fourth industrial revolution and migration as twenty-first century trends. These trends present citizens with many opportunities, however, not without challenges. The overall purpose of global competence is to

effectively respond to twenty-first century trends in a sustainable and inclusive manner. Additionally, globally competent citizens must be able to identify and cope with potential conflicts or disagreements between people and institutions. To respond to societal trends, reduce their damage and harness these societal forces for good, will require citizens with a special set of skills. In other words, if countries are to thrive in a sustainable manner, the development of globally competent citizens will need to be prioritized.

Global competence is a complex, multidimensional concept which contains systematic objectives. In the analysed documents, the objectives of global competence have been reconstructed and presented as dimensions. Some documents showcased four dimensions while other documents only three dimensions. Furthermore, the different dimensions of global competence contain a set of knowledge, skills and attitudes globally competent citizens must strive to develop. The following are the four dimensions illustrating knowledge, skills and attitudes required:

1. The ability to investigate local and global issues. Higher order thinking and the selection of appropriate knowledge sources are required to form an opinion about a local or global issue.
2. The attitude of openness, responsibility, and respect for numerous perspectives. Globally competent citizens understand and acknowledge the viewpoints of other citizens that may be different from their own.
3. The ability to engage in effective cross-cultural communication. Communication (written or verbal) is meant to respectfully share views and look for common ground not conflict.
4. The goal to make informed decisions and take sustainable actions. The action taken by globally competent citizens improves the conditions of others, themselves, and the planet. The action does not have to be global; the local environment is equally important and more realistic for most citizens.

For a citizen to be globally competent, all the above-mentioned dimensions of global competence should be harnessed. It is also important for globally competent citizens to have the ability to:

1. Identify and challenge their own and others cultural, gender and racial stereotypes and biases.
2. Make informed decisions in their daily lives using the knowledge, understanding, skills and attitudes they have acquired.
3. Ask questions before making assumptions about other citizen's cultures, history, and beliefs.
4. Disagree respectfully with others. Globally competent citizens view disagreements as the opportunity to add to their own perspective, instead of seeing it as a threat or a source of conflict.
5. Display empathy, value human dignity and cultural diversity.
6. Work with diverse groups towards a common objective.

It is important to recognize that the twenty-first century has created changes in employment. Jobs that involve repetitive tasks or scripted reactions are being done through automation and computers. In addition, businesses are becoming multinational organizations, requiring employees to work with people in different parts of the world. Simply having a degree does not make a graduate employable.

The changes of the twenty-first century call for employees who are globally competent and thus able to capitalize on the opportunities offered.

HEIs response to twenty-first century trends

HEIs in South Africa have effectively adapted their curriculum, resources, and strategic planning to cope with the changes of the twenty-first century. HEIs prioritize their response to three twenty-first century trends. Firstly, they dedicate their planning and resources to develop a knowledge society. Statistics within the analysed documents indicate that the number of citizens engaged in postgraduate studies is increasing. Furthermore, the quality and quantity of research has also shown promising progress. In addition, all South African HEIs are improving their enrolment rates. However, it is important to recognize that about 55% of students in South African HEIs do not complete their studies. Secondly, HEIs are continuously balancing the demographic dynamics of staff and students to be inclusive of diversity in terms of race, class, language, and gender profile of South Africa. Lastly, HEIs are involving all staff, students, and faculties in education for sustainable development initiatives. It is evident that institutions are aware of their responsibility to respond to all twenty-first century trends in a sustainable manner. In addition, South African HEIs are making efforts to address local as well as global challenges, through research and innovation.

Education systems play an important role in educating citizens about global developments that affect the world and their lives. Yet, educators are the key players who with support of management should play an active role in supporting and promoting global competence.

Educators' role in developing global competence

Education for global competence does not require new subjects to be integrated into the curriculum. Nor does it require exceptional teachers and an abundance of resources. Educators can develop the global competencies of their learners without the use of elaborate resources using four strategies: Firstly, subjects that are already being taught can be expanded to include a global dimension. Secondly, educators can integrate a topic broadcasted on the news into their lesson. Thirdly, educators can use learner-centered pedagogy to create a safe environment for learners to engage with controversial local and global issues. Lastly, any of the dimensions of global competence can be integrated into the lesson. In addition to the aforesaid, learners also need to have a say in their own learning. Therefore, educators should act as facilitators; continuously enable critical thinking by probing for more perspectives and deeper responses.

The successful implementation of global competence will depend on quality of educators' training. In other words, educators cannot teach what they do not know. Thus, through ongoing support from educational leaders, educators need to keep developing their own global competence and expand their teaching methodologies to nurture global competence within their learners. Furthermore, educators engaging with controversial issues need to manage their feelings of fear, anger, and anxiety. Educators should take responsibility for their own global competence by always being informed about the latest global topics.

Based on the analysed documents, the list was created to showcase examples of how educators can promote global competence in their lessons:

1. Use the rich diversity within the classroom to learn about different cultures, languages, and perspectives.
2. Learn about organizations such as the United Nations.
3. Evaluate unbalanced power, relationships, historical conflicts between countries and ethnic groups.
4. Learn about marginalised groups' use of languages, history, and cultures.
5. Educate learners about why climate change occurs and how it impacts different places.
6. Ask learners to track the origin of everyday products such as cell phones, sneakers, and musical instruments.
7. Use a community problem in a role-play activity in which, learners are given the opportunity to engage with real life challenges, decisions, and responsibility.
8. Organize structured debates that enable a deep analysis of global issues. The debates provide learners with a platform to present their perspectives and show their ability to communicate effectively and respectfully.
9. Play games where team members must pool together resources to solve a problem.
10. Inform students about the 17 Sustainable Development Goals by providing vivid examples.

Conclusion and recommendations

Global competence has been researched extensively by many prominent local and international researchers. However, global competence in the context of South Africa is under researched, thus this research study adds to the body of knowledge on global competence in this specific context. The findings expanded understanding about competencies that globally competent citizens need to have and educators' role in developing global competence. In addition, HEIs' response to the twenty-first century societal trends was explored.

It is encouraging to see the skills, knowledge and attitudes required to be globally competent being developed by HEIs. It is concerning, however, that the development of global competencies by South African HEIs is occurring in a scattered and inconsistent manner. The dimensions of global competence being developed by HEIs such as sustainable actions are being developed as a response to twenty-first century trends and unintentionally overlap with the dimensions of global competence. The term 'twenty-first century trends' is stated on multiple occasions and consciously planned for. Yet, the reviewed documents do not refer directly to 'global competence' even though they position themselves to respond to twenty-first century trends. In short, there is a lot of focus on twenty-first century trends but it is not clearly associated with global competence.

HEI educational leaders should consciously aim to foster global competence within educators and learners by adding the dimensions of global competence to HEIs' mission and vision statements. In addition, educational leaders should emphasize statements about global competence in educational documents such as strategic frameworks and annual reports. The development of global competence is

especially important for educators. Therefore, HEIs could prioritize programs that develop the global competence of graduates in all Faculties. Similarly, HEIs should continuously provide their teaching staff with ongoing professional support in the development of their own global competence. In turn, this will have the potential to transform teaching pedagogies that develop global competence in learners.

Considering that global competence can address major issues such as unemployment and inclusion then more South African research studies should investigate development of globally competent citizens. Scarcity of research on this topic may result in global competence being disregarded and further excluded from future curricula and educational strategic planning. Further exploration about the development of globally competent citizens within a South African context could include case studies about the effectiveness of an individual HEI in developing globally competent citizens. Moreover, an in-depth exploration of each faculty within a specific HEI could be explored to uncover the extent to which the faculty is developing globally competent citizens.

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Part 3

School Education: Policies, Innovations, Practices & Entrepreneurship

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Sex and Relationships Education in England – a Policy Causing Problems for Schools

Abstract

Sex and relationships education has been a controversial area of the curriculum in England for many years. Despite changes to the content and the approach to this material, many teachers and parents remained unhappy about issues such as: the right of schools to teach material that some think should be done in a family situation only; the problem of training teachers how to approach subjects that can be controversial; the right of parents to refuse to allow their children to take part in such lessons. Added to these is the subject division between the biological aspects, which were compulsory and the relationships area, which is so much needed to help young people consider their behaviour and attitudes to sex, sexual orientation and relationships of all kinds. Compounding these difficulties, is the need to teach within the parameter of ensuring that students learn about British values of equality, respect and the acceptance of different family configurations. This paper discusses the changes put into law in 2020, which have produced several further areas of contention, such as the inclusion of teaching about different sexualities and family structures, for example LGBT and same sex marriage, resulting in further controversy over withdrawal.

Keywords: sex and relationships education in England, LGBT, British values, Covid, statutory curriculum, controversy

Introduction

Teaching about sensitive subjects such as sexual relationships and sexual orientation in England has caused a great deal of controversy over the last few decades. The problem of dividing this material between science, where the differences between male and female bodies and reproduction are taught and relationships education (PSHE i.e. Personal, Social and Heath Education, plus Economic Education if not dealt with in Citizenship Education), which deals with feelings, respect for others and the right to say no to sexual advances, had challenged teachers for years. In addition, the desire of some parents to see this area as their responsibility not education's, plus successive governments' refusals to make this a part of the statutory curriculum, has resulted in controversy, poor teaching, and. the desire of many to avoid the material altogether.

In the last decades the country has been shocked at the exploitation of young white girls, who have been groomed by some ethnic males to offer sexual favours (under the age of consent) for 'treats' such as meals, drugs, gifts etc. This problem was slow to be acknowledged by those responsible for the welfare of children, such as Local Authorities and successive governments. This was due to sensitivity considerations, over singling out specific ethnic/religious groups and creating racial tensions, eventually, whole groups of men in several areas of the country have been imprisoned, but not before the lives of many young underage and vulnerable girls had been ruined. This resulted in feelings changing to the idea that knowledge was strength. So, successive governments made some attempts to change the curriculum. In 2019, Parliament finally approved a changed and now statutory curriculum. This was to be linked to British values of respect, inclusivity and understanding of consent. However, these proposals have not made this area of the curriculum cease to be controversial, or teachers sufficiently prepared to deliver this new statutory curriculum to students.

Controversy over the curriculum

Recent changes to the curriculum for Relationships, Sex and Health Education (RSE) (note the renaming) have resulted in some serious protests to schools in England, particularly from Muslim parents in areas of the country with high Islamic populations. RSE has been an area of controversy for years, as some parents of disparate cultural groups, considered that these subjects were for parents to address, not education. Some also believed, that the material delivered should reflect their individual cultural or religious beliefs. This idea has clashed with more liberal thinking, for example, areas such as same sex marriage, cohabiting and diverse family groupings. Highly controversial ideas for some to accept. The biology of males and females, including the reproductive system, pregnancy and birth, was always compulsory learning in secondary science. In addition, most primary schools prepared pupils for puberty and discussed where babies come from. The relationships lessons were where parents could withdraw their children. However, children heard from peers what had been taught; not always an accurate rendition however (Hilton, 2007). These students became adept at avoiding taking home official school letters, on withdrawal of children from sex education covered in PSHE lessons. Most people in the teaching profession who were delivering PSHE lessons, deeply regretted this option of withdrawal, as it took the students away from the discussion of responsibility, choice and respect for partners.

The new curriculum

The last review of education about sexual matters was in 2000, so the subject was in need of updating to include changed attitudes to sexuality and to prepare students for life in the twenty first century (Baukham, 2021). The new curriculum for RSE was made compulsory from September 2020 (Gov.UK, 2019), providing schools were ready to meet statutory requirements. If not, summer 2021 was offered, to allow schools time to adjust their curriculum approach and to cope with the effects of the Pandemic. The RSE area remained unpopular with some parents and much press interest occurred with incorrect and intentional sensationalising of the

proposed content of lessons, spread by much of the media, who enjoyed creating controversy (Hallahan, 2020). This resulted in difficult meetings in many schools, where parents attended consultations on school sex education, possessing incorrect information, with which they challenged teachers. The Department for Education (DfE) has prepared a large number of documents to advise both primary and secondary schools of the requirements that have been set in place. These included a fifty-page document entitled *Relationships Education, Relationships and Sex Education (RSE) and Health Education,* with further materials related to guiding teachers, the statutory nature of the curriculum and particular booklets related to primary or secondary schools. Supporting these are annexes, detailing the regulations for delivery; resources available; cross government strategies for both relationships and sex education; the start time of the curriculum. In addition, the DfE has issued several guides for parents prepared in a variety of languages.

When the new curriculum was mooted, many experienced teachers campaigned to make the subject compulsory, as lack of knowledge they felt could, in some cases, lead to problems such as forced marriage and female genital mutilation (FGM). Both of these issues had aroused serious concern. Young girls were being taken back to home countries, and forced into early marriage, or suffered FGM operations. Also, some doctors in the UK were imprisoned for undertaking FGM illegal operations. Schools are expected to report any unusual journeys overseas and the government, using a multi-agency approach, provides material to deal with these concerns. The Home and Foreign and Commonwealth Offices, provide an advice line on procedures if a planned forced marriage is suspected (HM Government, 2020; GOV. UK, 2013 updated 2020a).

The campaign for compulsory RSE resulted in concern from some parents. The Secretary of State for Education therefore reluctantly allowed withdrawal from sex education in secondary schools relationships lessons, but not biological scientific information on sexual differences, pregnancy and birth covered in the science curriculum. No withdrawal is allowed from any other part of health or relationships education. Once the child is three school terms before the age sixteen and requests to attend all lesson on sexual relationships, withdrawal is not allowed. The DfE considers this information essential to healthy living (DfE, no date). In the primary area withdrawal is not allowed from lessons, which cover puberty and the changing body, as this is designated as part of the science and health curricula (The Schoolrun, 2021). This complicated approach has caused difficulties for headteachers and for parents attempting to understand what is taught when and where. To some extent it depends on each school's curriculum so teachers are still concerned about giving 'forbidden' information during a compulsory relationships lesson.

An inclusive approach

RSE has moved on since the 1988 controversy, where schools were instructed not to 'promote' homosexuality via a law called Section 28, part of the Local Government Act of 1988, which was not repealed until 2003 (Greenland & Nunney, 2008). Though what this 'promotion' entailed was totally unclear, teachers were concerned that any mention of sexual deviation, could result in their dismissal. Today, discussion of lesbian, gay, bi-sexual and transgender (LGBT) relationships is

compulsory in secondary schools and children understand that legal marriages can take place between people of opposite, or the same sex. This is part of the new guidelines aimed at inclusivity and a more equal appreciation of different relationships: friendships, workplace relationships, or marriage. The intention, is to help young people understand human sexuality in all its forms and to develop respect for themselves and others, whatever their sexual orientation. The curriculum includes online safety and problems of grooming, methods of contraception and the understanding of consent in all sexual relationships. The aim is to keep young people safe, but also happy and in good health. However, such discussions are still causing controversy, despite the delight of the LGBT community at being treated as 'normal', in relation to love and sexual orientation. These changes were supported by the vast majority of Members of Parliament and welcomed by Stonewall the LGBTQ Charity, who immediately offered to help teachers in preparing sensitive lesson material. In primary schools discussion of families and friendships should occur, including families which vary, such as step-families and ones where there are two mothers or two fathers.

All schools must produce a written policy for relationships education or RSE and also for health education. In addition, schools have to consult parents whilst preparing that policy and ensure it meets the needs of pupils and is appropriate to the local community. Policies should be on the school website, free copies available and school governors consulted (DfE, 2019). However, enormous problems remain for those writing policies and delivering lessons, as guidance related to Key Stages and ages of schooling is not inserted.

Links to British values

This recent controversy became, in Muslim areas of Birmingham, centred on the combination of teaching British Values, an essential part of the National Curriculum for all schools and the right of parents to decide what should be included in RSE and who should teach it. Problems arose over one primary school's curriculum designed to teach children British Values, related to the aims of the 2010 Equality Act, including respect for sexual diversity, varieties of sexual orientation and different family structures. It aimed to help children to be proud of their own backgrounds, but to celebrate and recognise difference and diversity and prepare them for life in modern Britain (BBC News, 2019). The health education curriculum also covers healthy eating, having sufficient sleep, cutting time spent online, relationships and during secondary school, sex education is added to the list. Most primary schools have for years though, prepared their pupils for puberty and discussed areas such as pregnancy and where babies come from.

Training teachers

According to Discovery Education (2020), sixty five percent of teachers who responded to a survey on their confidence in delivering the new RSE, responded negatively, little different to previous findings. Teachers in primary and form teachers (those who have the responsibility for a particular group of students as well as teaching a specialist subject) in secondary, have often been expected to teach the relationships area of PSHE, with more or less no training (Hilton, 2009). Many

campaigns have been run and some efforts made by various governments have been tried, to train some specialist teachers. However, controversy rages when non-maths graduates teach that subject, rather than maths specialist teachers. Teachers with little or no preparation can however teach about relationships, including sexual orientation, without any questions asked. This subject has been viewed by many as a disaster area in the curriculum, with the subject often being badly taught in at least one third of schools. Press reports in 2013, showed Ofsted's annual report being highly critical of the teaching about sex in schools. These criticisms included; in primary, avoiding discussing puberty and over concentration on friendships. Whereas, in secondary Ofsted reported too much emphasis on the mechanics of sex and not enough about relationships, consent and preparation for sexual experiences (Long, 2020).

The Sex Education Forum in 2018 also surveyed RSE teachers, to see if they felt adequately trained (Hazell, 2018). One fifth of respondents, had received no training whatsoever, access to training was considered inadequate and they felt insecure about teaching the subject. Thirty nine percent considered the training received, was not good enough. Generally, this teaching is only a small part of a teacher's role, most spending their time concentrating on other subjects. To become a specialist in the area is very difficult to achieve. There were concerns about teaching areas such as contraception, pregnancy and the options available if the pregnancy was unwanted. Also, sexually transmitted infections and accessing sexual health services and guidance on responding to sexual content online, challenges many teachers. These areas are now compulsory from 2020, with twenty one percent of respondents not confident teaching about LGBT issues and making the subject inclusive. Even more controversial, is the idea of discussing with teenagers sexual enjoyment, satisfaction and the idea of consensual sex.

Improving sex education teaching

This catalogue of problems, plus the controversy of withdrawal from some lessons and other parental concerns, does not bode well for the new curriculum. For years English teachers and training providers, (often charities such as the Sex Education Forum and Children's Bureau), have advised an examination of the approach and delivery in Dutch schools. Lewis and Knijn (2001) comparing the two countries, suggested that in England the emphasis was on dangers and prevention of situations such as unwanted pregnancy and sexually transmitted infections. However, the Dutch present sexual relationships as a normal part of life, to be entered into with knowledge and little political controversy occurs. Teenage pregnancy numbers in the Netherlands are low; from age four all children have age-appropriate sexuality education, which is designed to build understanding of one's own and others sexuality (Avery, 2019). In England the need to halt a rising tide of unwanted teen pregnancies in the late nineties and early twenty first century, helped some attitude change across the country. However, the need for relaxed, confident teachers so desired by students, especially boys, has not as yet been catered for. Boys, dread teachers' embarrassment needing staff who understand their innate need to pretend, that they know all about sex and do not require much instruction (Hilton, 2007). To provide excellent RSE, either we need specifically trained teachers, or at least much more continuing professional development for serving teachers.

Certainly, this is not a subject area that anyone should be forced to teach. It is good to have familiar teachers to deliver this subject, with some possible experts who add weight of information and support school staff, as most students say they are happier with teachers they know, when discussing sensitive information (Hilton, 2007).

Realising the problems that inexperienced staff have with teaching this area of the curriculum, the government has finally made wider attempts to offer training on how to teach in this area in *Guidance, teaching about relationships, sex and health* (GOV.UK, 2020b). This sets out the training modules available for teachers with the intention of increasing knowledge. These include preparing policies, teaching materials and lesson plans for subject leaders, linked to the statutory guidance. Certain schools are designated as Teaching Schools, to advise and support other area schools with training activities. This, to some extent, is reaching more people than previous initiatives, but does little to acknowledge that some teachers are not suitable for delivering this material, due to embarrassment, religious beliefs or other concerns that prevent them being confident, relaxed and able to approach difficult material easily.

HMI Pownall (2021) Ofsted subject leader for PSHE, points to the need for clear agreed goals in curriculum design for RSE, an avoidance of being influenced by passing trends and that all teaching staff have a joint understanding of the subject goals. There is need for a united intent from staff, on what needs to be taught and how the different elements of the subject come together to complete the whole curriculum. He acknowledges that the government supplied curriculum is not related to specific ages, or Key Stages in learning, but is left to the discretion of the schools and the subject leader, which can be difficult for curriculum planning. In addition, work has to be planned with whole school agreement across subject boundaries in PSHE and Biology. Ofsted expect that during inspections, they will see that learned knowledge in these areas impacts on pupil behaviour in school.

Conclusion

If young people in England are to have a good grounding in RSE from primary school onwards, it is essential that the problems with the teaching and learning in this area are worked on and overcome. Preferably, it would be better to have this curriculum area offered as a specialism by teacher education departments, possibly twinned with another subject in order to ensure that knowledgeable, confident teachers deliver this material. The present system of leaving this controversial and sensitive material to reluctant form teachers, not trained in this area, is not the way to proceed. Ofsted's new remit to base inspections on the curriculum, not exam results, should encourage a change of approach. In addition, having specially trained teachers to work in this area, would allow students to develop trust. Such an important area of education for young people, deserves honesty, good information and above all knowledgeable, relaxed, confident teachers who can demonstrate empathy, be happy to admit to the funny side of talking about such matters and above all, lack any appearance of embarrassment, as this is anathema to their students.

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Global Education Inequities: A Comparative Study of the United States and South Africa

Abstract

Access to quality education for all children is a common mantra for countless national and world organizations, such as the UN and its Sustainable Development Goals (SDGs). This paper examines the struggle within two nations who continue to move beyond the impact of racial segregation in the United States (US) and *apartheid* in South Africa (SA) to achieve equitable access to quality education for all children, regardless of race, ethnicity, language, or socio-economic status (SES). The paper begins with an overview of the historical paths both nations followed in their slow evolution away from harsh segregation and *apartheid* governance designed to provide unequal educational opportunities for its youth. Beyond these historical sketches is a brief review of theoretical perspectives help to explain how unequal systems of education are maintained and how they can be transformed into agents of positive social change. This is followed by an examination of factors in both the US and SA that are capable of sustaining unequitable access to quality education while providing disproportional levels of negativity such as suspensions or dropping out (or being "pushed out") of school based on a child's race, gender, ethnicity or SES. The paper concludes by asking (at least in the US case), whether the "way forward" may be guided by examples of the past, such as the quality of education provided to Black children in the era of legally segregated Black schools in America's South.

Keywords: *apartheid*, segregation, South Africa, United States

Introduction

This paper analyzes the struggles experienced by the United States (US) and South Africa (SA) as they attempt to move beyond years of racial segregation and *apartheid* to achieve equitable access to quality education for all their students, without regard for race, ethnicity, gender, language, or socio-economic status (SES). Following a brief historical and theoretical overview, the authors analyze various factors that have impeded equitable education for all, and the disproportional quality and types of instruction correlated to a child's race, ethnicity, gender, language or SES. The paper concludes with a "way forward" that looks to historical examples of equitable, quality education for all.

A history of segregation, integration and resegregation in US schools

After two centuries of slavery in the US ended with the defeat of the Southern Confederacy in 1865, anti-literacy and Jim Crow laws ensured that inequality would continue based on race, ethnicity, language, gender and SES. According to Walker and Archung (2003, p. 21), Southern Whites purposefully "segregated African Americans into separate schools that received less money in state expenditures per

child". This intentionally designed, inequitable education systems based on race was solidified by the 1896 US Supreme Court decision, "Plessy v. Ferguson", that maintained racial segregation within public schools under the guise of "separate but equal". This remained until 1954 when the US Supreme Court reversed itself with the "Brown vs. Board of Education" ruling stating that separate was inherently unequal, and ordering school desegregation with "all deliberate speed". Slow progress in Southern schools initiated the 1964 Civil Rights Act, and 20 years after the Brown decision, the last student in the Southern state of Florida educated within Black segregated schools graduated in 1974.

Interestingly, processes to achieve racial integration, such as mandatory busing in the 1960s, often enhanced the growth of White academies and magnet schools, and later led to educational "choice". While magnet schools provided a positive incentive for voluntary integration, it also accelerated the resegregation of public schools while reducing funds for local public schools by developing public charter schools (Heilig, Brewer & Williams, 2019).

A history of segregation and post-*apartheid* education in SA

Humans have inhabited and displaced one another for over 100,000 years, including the histories of colonialism and *apartheid* in what is now SA. Moreover, current segments of SA's history have directly caused severe SES inequalities throughout society and education. This section focuses on the establishments of the Republic of South Africa and the beginning of the *apartheid* era (1948-1994), when racist legislation enacted discriminatory and segregationist laws first established in the Dutch Cape Colony in 1856, and extended during British colonization. This system of *apartheid*, which lasted until 1991, entrenched oppressive legislation beginning with the Native Land Act of 1913 that established *"Bantustans"* through the forced eviction of thousands of Black Africans from their land and homes. Though anti-*apartheid* resistance occurred nationwide since the 1940s, strict segregation of society (including schools) persisted. Moreover, extension of the University Education Act #45 of 1959 prohibited Blacks from attending historically White universities and established what became known as the "Historically Disadvantaged Institutions", such as the Universities of Fort Hare, for Black students (Ndimande, 2013, p. 21). Until post-*apartheid* and the election of Nelson Mandela, schools and universities remained legally segregated, and unequally funded. Unfortunately, as in the US, amending policies does not necessarily transform systems of education, nor people's hearts.

Though SA continues to address their unequitable legacies through a decoloniality agenda, Ntshoe (2017, p. 70) noted "new forms of hidden and subtle discrimination, racism and resegregation are developing in South Africa". This also occurred within educational pedagogies such as Outcomes-Based Education (OBE) and the current Curriculum and Assessment Policy statements (CAPS) which focus on broad-based education, rather than on diversity sensitive education (South African Department of Basic Education, 2021).

Theoretical perspectives regarding the causes of educational inequalities

This section analyzes theoretical perspective that blame a racist society, students' inferior genetics and home life, and/or dysfunctional schools. However, it also suggests that instead of schools destined to reproduce societal inequalities, they may instead function as agents for positive social change.

Blame a racist society for school inequalities

Critical Race Theory (CRT) blames a racist society for educational inequities. Delgado and Stefanic (2017, p. 7) state that CRT perspectives help explain the negative impact of "…school discipline and hierarchy, tracking, affirmative action, high-stakes testing, controversies over curriculum and history, bilingual and multicultural education, and alternative and charter schools". CRT also suggests that racism and resegregation of schools and communities is a serious critique of Westernized curricula and deficit theory perspectives. From a more global perspective, this argument reoccurs in current demands for "decoloniality" and the Africanization of curricula within a post-*apartheid* SA.

Blame dysfunctional schools

Some theories blame dysfunctional schools for systemic racialized education and curricula. From this perspective, scholars such as Artiles and Trent (1994) and Serwatka, Deering and Grant (1995), underscore the dissonance between school and home cultures as an explanation for unequitable education based on students' race, ethnicity, language and/or SES. Thus, inequities are blamed on a school's inability to provide a cultural bridge between traditional school practices and students' home cultures, languages and values.

Blame the victim

This approach blames students and their families for educational inequities due to their racial and social backgrounds. Authors such as Herrnstein and Murray (1994), for example, sustained theories of genetic inferiority that blamed students and their home life for academic failure. The negative impact of such perspectives encouraged the elimination of compensatory education programs, such as Head Start in the US, as it was assumed that education could not overcome genetic deficits, and thus there was no need to fund programs for minority and/ poor children.

Reproduction of societal inequalities

This perspective suggests that schools simply reproduce society's inequalities instead of functioning as agents for positive social change. It argues that schools serve the interests and needs of the dominant class (which in many countries is White), thus reducing other students' equal chances for success. For example, traditional school curriculum often functions to reproduce societal beliefs and assumptions. Moreover, Ndimande (2013) posits that this also excludes indigenous knowledge within the curriculum.

Conflict theorists

This final perspective assumes that both schools, and the societies in which they exist, serve as a means to dominate, exploit, oppress, and subordinate marginalized and poor students. This perspective is succinctly reflected in Freire's *Pedagogy of the Oppressed* (1970).

Decolonization or resegregation? Reflections on US and SA experiences

Though separated by thousands of miles, the US and SA share some similar patterns of social and economic inequalities based on race, as reflected in segregated school systems that are supposed to provide equitable education for all children. Sadly for both countries, there have been multiple promises, yet unfulfilled policies and programs designed to establish education that is more equitable. However, many US desegregation and SA post-*apartheid* policies have evolved to address the problems that addressed the institutionalized and sustained inequalities linked to educational opportunities. These issues were underscored by multiple scholars such as Kozol who focused on the "Savage Inequalities" within US schools. In a similar manner, Ndimande (2013) argues that SA schools are continuously widening the gap between SES, race and gender, as the location of a school often plays a critical role in the provision (infrastructure) and quality (service delivery) of education.

Clearly, the struggles for greater educational equity in the US parallel ongoing decoloniality and the Africanization struggles within SA. While the US began this difficult task in 1954 with the landmark Brown decision, SA initiated its journey toward greater racial equality four decades later, when *apartheid* policies ended in 1994. Moreover, whether framed in terms of desegregation, decoloniality or indigenization, research suggests that both countries continue the struggle to provide equal access to quality education and service delivery for all children. Scholars such as Black, Spreen and Vally (2020, p. 48) made the following succinct comparisons regarding the daily struggles of children in both countries: "As in South Africa, the US has millions of children who are homeless, food insecure, and without health care. Schools serve critical social reproduction functions for the vulnerable beyond their core role of advancing learning, by providing feeding schemes, computers and connectivity to those without, and – in many cases – childcare for essential workers".

Research has critically analyzed curriculum, arguing for the need of a decoloniality agenda that provides culturally relevant and historically accurate content and delivery modes. They demand a curriculum in stark contrast to the White/Eurocentric curricula reflective of the previous US segregation and SA *apartheid* policies. Christie (2020) suggests that decoloniality must separate knowledge production from previous Eurocentric foci, and extend beyond the assume universality of Western knowledge and superiority of Western culture. For Walker and Archung (2003, p. 25), "…the education of Blacks in both countries was embedded in a system of racial segregation, designed to promote Whites into positions of leadership, land ownership, and economic control and to doom Blacks to subservience".

Clearly, any comparison of the US and SA requires analyzes that respect significant differences between their cultural and educational histories. For example,

Blacks are a majority in SA but a minority in the US, and Blacks in SA, unlike their counterparts in the US, were not enslaved. Nonetheless, threads of comparability between the two cases remain informative when unpacking notions regarding greater equity for all students.

School "choice" and the resegregation schools in the US and SA

Ironically, mandatory busing to achieve racial integration in the US beginning in the 1960s not only encouraged many White students to leave public education, which enhanced the development of private White academies, but also led to "choice" through the growth of magnet schools. These were originally designed as incentives for parents to send their children voluntarily to integrated schools featuring specialized "magnet" programs. In SA, the rise of private schools focusing on a single culture and language have increased, which furthers social inequality.

Unfortunately, since US desegregation was abandoned in favor of multiple "choice" programs in the 1990s, "the tremendous progress in the South has been slowly eroding year by year as black students and the exploding population of Latino students become more isolated from white students" (Orfield & Lee, 2005, p. 4). Moreover, while magnet schools have reduced high concentrations of poverty by attracting a more diverse population of students, it remains unclear if magnet schools are successful in promoting racial integration. The 1990s' concept of educational "choice" posited that schools would improve naturally if forced to participate in a free marketplace. While magnet schools and "choice" have the potential to reduce segregation based on race, we are reminded that mandatory plans to achieve racial balance have been three times as successful in promoting integrated education as voluntary plans, such as magnet school.

However, as the US extended parental choice, in SA racial desegregation in the early 1990s led to a movement where thousands of children began to attend non-local schools. While educational planners predicted Black children's desire to take advantage of better-resourced schools, few expected that White children would also choose to attend a different public school or to obtain access to a private school in an urban setting based on SES more than race.

Clearly, the linkages between race, school choice and educational stratification affect both the US and SA. Scholars such as Hill (2016) have underscored how a family's race is closely linked to their efforts to take advantage of choice opportunities by transferring their children to schools offering better educational programs. However, these linkages are rather complex and intersect with other social diversity issues, thus negating simplistic one-to-one correspondence explaining how historically disadvantaged groups have engaged in post-*apartheid* and more inclusive educational opportunities (Blake & Mestry, 2020).

Conclusion: Looking back to find a way forward? Reflections on historically black segregated schools in the US

While one might assume that moving from segregated to desegregated schools would provide marginalized populations with greater access to quality education in both the US and SA, this may not be the case in all instances. While the authors do not suggest resegregating schooling, there may be a "way forward" by looking to

our past. For example, while clearly segregated schools for Black children in the US received unequal funding and support as compared to White schools, it would be erroneous to assume that the quality of instruction in Black segregated schools was also substandard. Scholars such as Patterson et al. (2008, p. 312), have captured the oral histories of Black students who were educated in these segregated schools. As an example, they found that "According to the alumni, Douglass School was the heart of the Black community and was integral in providing cohesion to a community divided by geography and church affiliation… the one institution in the Black community where everyone came together, where teachers and parents worked together to ensure that their children received a high quality education".

Moreover, three themes have emerged regarding segregated schools. First, students recall that attending these schools was an extremely positive experience. Second, students remembered that these schools demanding academic rigor. Third, even though these schools were significantly underfunded, they maintained a dynamic and rich educational experience. Clearly, the curriculum within Black schools was a politically strong defense to combat segregation, particularly as many of its harmful effects were underscored through stereotypes, misinformation, and the omission of Black history and culture in public schools. Finally, it is clear that the quality of teachers remained exceptional by stressing academic success as a means of competing within the dominant White society. Sadly, for Black students in the US, racially integrated schools often excluded this former determination to transmit a challenging curriculum to students who were expected to succeed. Learning was reduced to conformity in an atmosphere that often viewed Black students from a deficit perspective. To move forward, while remembering past strengths, nations such as the US and SA should promote teacher education programs that are more inclusive and reflective of their diverse student populations while transforming their racist, sexist and classist curricula.

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The Quality Assurance Movement: A Lesson from Hong Kong Schools

Abstract

In the last two decade, the Education Bureau has implemented a two-pronged approach to assuring the quality of education in Hong Kong: an external mechanism via inspection and an internal framework via self-evaluation. However, both of which are mainly top-down and not as effective as expected. This paper reports on an investigation into the effectiveness of implementing self-evaluation in Hong Kong schools and the factors that may have hindered and/or facilitated such a movement. In the conclusion, suggestions are made for policy makers and school practitioners' considerations when they strive to maintain sustainable development in schools.

Keywords: quality assurance, self-evaluation, school inspection, sustainable development, continuous improvement, Hong Kong

Introduction

Hong Kong schools have been confronted with challenges brought by the huge information flow and vigorous innovative moves due to globalization (Pang, 2006). Hong Kong policy necessitates that schools transform into learning communities so as to meet the expectations of their stakeholders. If a school has to become a learning community, it needs to enhance its own learning capacity in such a way that the whole school seeks organizational improvement in a continuous process. School leaders have to submit to a paradigm shift from hierarchical, supervisory and controlling roles to facilitative and supportive roles with careful planning.

School leaders may make use of self-evaluation as an internal mechanism to initiate, lead, and manage organizational change. School self-evaluation will lead to evidence-based organizational change, which allows the school leaders to successfully institutionalize a self-renewal framework in daily managerial practices, as well as to lead and manage change effectively and efficiently. An effective educational leader also plays a central role in placing school self-evaluation (SSE) in a development cycle of continuous improvement. Through the procedures of self-evaluation a self-renewal strategy will, it is hoped, be institutionalized in the school's management structure. This paper explores the roles of self-evaluation in leading school organizational change and the possible ways of managing school change through self-evaluation. In the following sections, a review of the implementation of school self-evaluation (SSE) in the quality assurance movement in Hong Kong is first given. Then the findings from a qualitative research into the effectiveness of the implementation of SSE in Hong Kong schools are presented, in which both hindrances and facilitators to SSE are examined. Finally recommendations are made for the considerations by policy makers and school

practitioners when they think of maintaining the sustainability of school development.

The quality assurance movement in Hong Kong

There have been rapid changes in both the education system and schools themselves in Hong Kong, due to the recommendations of the Education Commission Report No. 7 (ECR7) issued in 1997. The ECR7 recommended a two-pronged approach to ensure the quality of education in Hong Kong: an external assurance mechanism and an internal quality assurance framework. While the external quality assurance mechanism was achieved through the establishment of the Quality Assurance Inspectorate (QAI) in 1997 to which schools were accountable, the internal quality assurance framework relied on schools' own capability at self-evaluation as the process of school improvement. The external quality assurance mechanism was done through adopting a whole-school approach to inspection by the QAI, which assesses schools' effectiveness, identifies their strengths and weaknesses, makes suggestions of ways of improvement and development in the schools and releases inspection reports for public reference. In order to improve the quality of school education continuously, all schools were also expected to engage in cyclical processes of evaluation, planning, implementation and on-going self-evaluation. Every school must work towards meeting the educational needs of its students as effectively as it can and self-evaluation provides information on which to base plans for improvement. By self-evaluation, all schools should produce documents which outline the long-term goals, prioritize development areas, set out specific targets for implementation, evaluate progress of work during the school year, and set improvement or development targets for the coming year (Scottish Office, 2002).

School self-evaluation (SSE) is a mechanism through which a school can help itself review the quality of education, improve continuously and develop itself into an effective school. The three major questions usually asked in school self-evaluation are: (1) What is our school's present performance? (2) How do we know about the school's performance? (3) What will we do after knowing the performance? They seem to be simple questions, but if we want to have a full picture or a thorough understanding of the school through a systematic and objective evaluation of the school's performance, they may be very difficult to answer.

Schools can only improve continuously when they have institutionalized a self-evaluation framework in daily practice and when there is a set of valid, reliable and school-based performance indicators available for use in self-evaluation. Practicing self-evaluation enables schools (i) to develop formal procedures for setting school goals; (ii) to have participation of teachers, parents and alumni in school management, development, planning, evaluation and decision-making; (iii) to assess their progress towards goals as well as their own performance over time; and (iv) to take appropriate steps for improvement. When school-based indicators are translated from the aims of the schools, they are useful tools for measuring and monitoring school performance in areas of interest. Self-evaluation with appropriate school-based indicators provides information to schools, teachers, parents, students and the community with the general profiles of schools for reference and for comparison among schools of similar background, or within the same quality circle. School self-

evaluation and school-based performance indicators are the crucial elements for continuous improvement in schools.

To successfully institutionalize a self-renewal framework in daily managerial practices as well as to lead and manage change effectively, the leader needs to: (1) acquire appropriate knowledge and understanding of the theoretical framework and concept of school self-evaluation; (2) develop and acquire the necessary skills and attitudes for self-evaluation and manipulation of performance indicators; (3) think through the leadership role as a guide to action; and (4) clarify for themselves, the strategic elements that are essential for an effective implementation of the school development plan. Then, the principal should examine the types of knowledge, kinds of skills and the attitudes which need to be developed for successful implementation of organizational change.

The effectiveness of the implementation of self-evaluation in Hong Kong schools

A qualitative research was conducted to solicit the principals' and teachers' views on the effectiveness and usefulness of the projects and exploring the factors that help and hinder the implementation of school self-evaluation (SSE) in Hong Kong schools. A sample of 20 schools was randomly selected for the qualitative research, and their principals were interviewed. Teachers' views on the same subject matter were also solicited during whole-school workshops held in the schools. The principals and teachers' views and opinions, thus collected, were summarized and transcribed, and subsequently analyzed and categorized into themes. These are summarized below.

Factors that hindered the implementation of SSE

Generally, most principals and teachers opined that school self-evaluation had become a normal practice in schools, though it was a new and innovative concept. They thought that since the implementation of school self-evaluation involved a paradigm shift in school management and change of practices in normal school lives for all teachers, external support including financial resources, staff development programs and in-house and consultancy services should be provided. In addition, most principals and teachers would like school self-evaluation be implemented phase by phase, thus giving them more time and 'space' to acquire new knowledge and skills in the matter. They reported that in the present turbulent school environment where there were already many school reforms and innovations, further introduction of new concepts, such as school self-evaluation would inevitably lead to resistance. There were many specific factors that hindered the implementation of school self-evaluation in Hong Kong schools, problematic at the time the views were collected, and these are summarized and classified at the system level and the school organizational level as below.

Hindrances at the system level

1. **A loosely coupled system**. The Hong Kong education system clings to a loosely coupled system, with aided schools forming the major sector. About 80% of schools in Hong Kong are aided schools, 5%, government schools,

5%, direct subsidized schools, and 10%, private schools. While aided schools receive financial support from the government, they have their own school sponsoring bodies and management committees. Aided schools, by comparison with government schools, have greater autonomy and discretion to respond to requests for change and the implementation of education policies by the Education Bureau. That is, resistance to change in the Hong Kong education system is much greater than that in education systems in other countries, where the state or government schools form the largest sector.

2. **A too ambitious plan**. There are approximately 1,000 schools, primary and secondary, in the Hong Kong education system. Conducting whole-school territory-wide inspections or external school reviews within a few short years was an unrealistic plan. Expecting most schools to be self-reliant in conducting self-evaluation, and to be able to raise their capacity for change within a year or so was again impractical and unattainable.
3. **Too many existing reforms**. There have been many new reform proposals for the education system in Hong Kong in the 21st century, in addition to those left over from the last decade. Most of the implementation of these reforms and policies was attempted without good planning and co-ordination. Schools have been suffering from the great burdens and confusion arisen from these reforms. Any introduction of further new reforms and programs in schools would cause at best, indifference and perhaps resistance, because of tremendous pressure and workloads already existing in schools.
4. **School self-evaluation is a complex process**. The implementation of school self-evaluation involves a change of school culture and a change of general practices in school lives. Such changes cannot be achieved only by directives issued by the education authority, but need a well-planned, bottom-up strategy of initiation and introduction which needs extra resources and supports from external sources.
5. **Lack of resources**. Effective implementation of new reforms or initiatives needs extra resources and support. At the time of economic recession in the early years of the new millennium in Hong Kong, the shortage of financial and human resources created more difficulties for the implementation of school self-evaluation throughout the territory.

Hindrances at the school organizational level

Implementation of school self-evaluation at the school level is not an easy task, given the present turbulent environment and conservative culture found in most Hong Kong schools. Based on the research, major factors that hindered the effective implementation of school self-evaluation were summarized. Since these factors are commonly found in most Hong Kong schools, they are worthy of the special attention of school leaders and administrators.

1. The plurality of categories of stakeholders and the diversity of views and opinions in schools might lead to many excellent sets of reforms being opposed.
2. Past failed experience in the implementation of educational policy caused schools to take a passive and conservative approach to educational reforms.

3. Schools are inevitably political arenas and power struggles are common. These create resistance to educational change in the schools.
4. School leaders and the teachers in some schools might be embroiled in conflicts, which caused tensions, fears, and low morale among teachers, not conducive to introspection.
5. The communication breakdown between teachers and administrators found in some schools resulted in a very weak basis for professional collaboration and commitment.
6. There were no formal, systematic, and in-depth, well designed professional training programs to train people in the implementation of SSE.
7. Most schools were either passive, or reactive against change, and there was a little culture of organizational learning in schools.
8. Most schools lacked a long-term vision of or planning for school development and improvement.

Factors that facilitated the implementation of SSE

Though there is a predominance of factors that have hindered the effective implementation of self-evaluation in Hong Kong schools, there are a few factors, at both the system level and the school level, that have facilitated self-evaluation in the school context.

Facilitators at the system level

1. **A leaner, flatter governance structure of the central education authority**. Based on the recommendations of the report on the review of the Education Department (Education and Manpower Bureau, 1998), the Hong Kong Government successfully merged the Education Bureau (EB) with the Education Department (ED) in 2002. The governance and ruling structure for the school education system has changed from a three-tier structure (Bureau-ED-Schools) to a two-tier one (Bureau-Schools). The interdependence between policy making and policy implementation has been strengthened and the school education system has become more tightly coupled. The central educational authority is now more interactive, and responsive to addressing the problems and difficulties which arise in the implementation of quality assurance mechanisms.
2. **An evolving model of quality assurance**. Though the two-pronged strategy (an external assurance mechanism and an internal quality assurance) to assure the quality of education in Hong Kong has remained unchanged since 1997, the framework for quality assurance has been evolving in order to meet new needs of schools in the ever-changing external environment. A new framework which enhances school development and accountability through school self-evaluation (SSE) and external school review (ESR) was introduced in 2003 (Education and Manpower Bureau, 2003). The framework stresses the internal mechanism more than the external one and more resources have been put into the promotion of school self-evaluation.
3. **Availability of tools for self-evaluation**. Following a few years' development and continuous testing, the Education Bureau has been successful in developing some sets of tools for school use in self-evaluation

(Quality Assurance & School-based Support Division, 2016a, 2016b). These tools include performance indicators and key performance measures in the domains of management and organization, teaching and learning, school support and ethos, and academic and non-academic outcomes. They provide a balanced coverage and a common platform for assessment of different aspects of schoolwork and student performance for SSE and ESR and will build territory-wide norms against which school performance can be compared and assessed. Stakeholders questionnaires for teachers, pupils and parents, and other tools in the social and affective domains for students have also been developed for use in SSE and schools are allowed to choose the relevant indicators for their own needs and uses.

Facilitators at the school organizational level

A few schools under the study had successfully created a culture of self-evaluation and organizational change. Such characteristics existed in some of these schools before they started to implement SSE as required by the policy. Factors that facilitated the implementation of school self-evaluation in these schools are summarized as below.

1. **An enhanced leadership**. There was an enhanced leadership in the schools that succeeded in implementing school self-evaluation and initiating organizational change. The management of organizational changes calls for "strong" leadership. Some organizational components have a limiting influence on other organizational components because of the presence of multiple and often conflicting goals. The success in achieving beneficial organizational change in these schools was due to the strong leadership that eliminated these tensions by deciding upon unified goals and clarifying technology.
2. **Shared values**. There were, to a considerable extent, shared values among the staff members in the schools which successfully implemented school self-evaluation in the management and organizational structure. Sharing values is the one fundamental basic that holds staff together and unified when faced with changes in long-term and short-term goals and visions. If organizations determinate means-ends structures for attaining preferred outcomes, then agreement about preferences is the only source of order that is left.
3. **Focused attention and setting priorities**. There was special attention on human relations in the management system in the schools that had successfully implemented school self-evaluation. Small step strategies within a confused, turbulent and ever-changing environment may produce more effective, efficient, interesting, varied, and thoughtful organizational changes. Leaders in these schools compensated for multiple and conflicting goals by carefully selecting targets, controlling resources, and acting forcefully.
4. **Good team spirit, high staff morale and a strong sense of professionalism**. The very successful schools in the implementation of SSE possessed a very strong teaching force that had good team spirit and high staff morale as well as a strong sense of professionalism. The formation of the strong and professional teaching force was not an accident but the result of deliberate and careful selection during the recruitment of personnel. High

teacher morale and strong team spirit were also the outcomes of the enhanced leadership and effective management systems in the schools.

The above findings in the qualitative research into the effectiveness of implementing self-evaluation in schools and the factors that hindered and facilitated organizational change shed light on how school administrators can lead and manage organizational change for school development and improvement.

Conclusion

Evidence-based organizational change has become a very recent trend in the school reform and improvement movement, in which school self-evaluation plays an important role. School self-evaluation provides a framework which allows school leaders to institutionalize a self-renewal strategy in daily managerial practices as well as to lead and manage change. Due to various hindrances at both the education system level and the school organizational level, some Hong Kong schools have not been successfully establishing a self-evaluation framework and some schools are still having a weak culture of self-renewal. Nevertheless, a normative-re-educative strategy may be effective in helping schools to surmount the resistance and hindrances found at both system and organizational levels. The practical experience gained from a few successful schools can shed light to other schools to transform into learning organizations through the implementation of school self-evaluation.

In order to facilitate change in schools, administrators should have enhanced leadership that unifies the school's goals and clarifies the technology for achieving them; promotes the sharing of values among all members and agrees about preferences; and focuses attention by carefully selecting targets, controlling resources, and acting forcefully. Not only do good team spirit, high staff morale and a strong sense of professionalism form the crucial basis for change, but they also help reduce the resistance to change. Effective leaders are those who can adopt these approaches to change flexibly in coping with the challenges created from the ever-changing external environment and in leading their organizations towards excellence.

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Motivation of Students for English as a Medium of Instruction (EMI) and Content and Language Integrated Learning (CLIL): Current Research Foci in Different Countries

Abstract

Content and language integrated learning (CLIL) and English as a medium of instruction (EMI) are emerging as the preferred contexts of language learning. CLIL and EMI classes continue to proliferate in schools around the globe. The aim of this paper is to investigate the current research trends in studies of motivation to learn within EMI and CLIL settings. We sought to identify the current countries of research, educational levels, and themes that prevail in EMI and CLIL motivation research. We performed a topic search of the keywords "CLIL" or "EMI" and the keyword "motivation" in the *Web of Science* database for Social Sciences Citation Index (SSCI) articles published in 2020. We analyzed 17 articles related to motivation within EMI or CLIL contexts. The results showed that European countries produced the most research, with Spain being the most prolific. A majority of the studies took place at the secondary and tertiary levels of education. Comparative studies of CLIL or EMI contexts with that of traditional classrooms emerged as the prevailing theme. Future research could include more studies regarding the impact of CLIL on students at the primary level of education, in addition to studies of students from varied socio-economic backgrounds.

Keywords: English as a medium of instruction, content and language integrated learning, motivation, Europe, Asia, South America

Introduction

As the prominence of English as the lingua franca of academia, business, and tourism continues to grow, many schools across the globe have place emphasis on English language learning. In order to prepare students for these fields, English has emerged, not only a foreign language, but more importantly, as the language of academia used for teaching and learning in a variety of curricular subjects (Rose et al., 2020). As such, two new forms of English language learning have emerged: content and language integrated learning (CLIL) and English as a medium of instruction (EMI).

EMI refers to a setting in which English is used to teach academic subjects to L2 (second language) users of English. It is a relatively common and favored method at universities (Kao, 2020). The availability of EMI courses enables institutions to attract both domestic and international students by creating the opportunity to provide instruction to students from differing L1 (first language) backgrounds. However, there remain concerns that content learning may be hindered by students' potential lack of English language skills (Reus, 2020).

In the CLIL classroom, concerns about content learning are lessened by the fact that both language skills and subject area content are taught co-equally (Kao, 2020). As such, the objectives of CLIL instruction are to generate both language learning and content knowledge gains (Pfenninger, 2020). Due to the nature of this practice, teachers in the CLIL classroom have the dual responsibility of both content and language lesson planning and instruction (Kao, 2020).

We attempted to investigate how these forms of English learning impact student motivation. Our research questions are as follows:

(1) Which countries feature most prominently within the current research on motivation to learn or teach in the context of CLIL or EMI?
(2) Regarding educational level, which populations are studied most prevalently in this field of research?
(3) Which themes have emerged within the key findings of the literature?

Methodology

We searched the topic "CLIL AND Motivation" OR "EMI AND Motivation" in the *Web of Science* (WoS) database in January 2021. The search was limited to SSCI (Social Sciences Citation Index) articles published in '2020'. The number of returned records was 18.

After the initial screening one of the returned records was excluded due to lack of relevance. The total number of analyzed records in this study is 17.

The records were classified according to three criteria:

a) country of research – for each record we identify the country where the research were conducted;
b) educational levels of the researched populations – based on the International Standard Classification of Education (ISCED), for each record we identify whether the researched populations are in the level of primary (ISCED 1), secondary (ISCED 2 or 3), post-secondary non-tertiary (ISCED 4), tertiary (ISCED 5, 6, 7, or 8) education; in the case of types of populations other than students, we specify the researched group;
c) key findings – we summarize the key findings and categorize them; we let categories emerge in order to see the state of the art in this field.

Researched populations

Country of research

Literature from Europe comprised the majority of the research (N=11, 64.7%) that was returned by our search. Most of these papers came from Spain (N=6), a well-established country for CLIL motivation research. However, a number of European countries appear within the body of research into CLIL and EMI as it relates to motivation, including Germany, the Netherlands, Russia, and Switzerland.

Regarding Asia, we found only two papers from Chinese speaking regions here (Mainland China and Taiwan). The only other country within Asia that appeared was Japan with two studies.

In South America, Argentina, Colombia, and Chile produced one study each. Researchers (e.g., Reus, 2020) have noted the beginnings of a CLIL push in Latin America, perhaps similar to that in Europe over the past two decades.

Educational levels of participants

The education levels of the participants in the studies varied with the majority (N=8, 47.1%) of studies featuring samples of students at the secondary level of education. We found a lack of research at the primary education level (N=2, 11.8%). In total, 6 studies focus on participants from the tertiary educational level (university students). Some studies also included teachers as a researched population (N=5, 29.4%). Note that 4 papers focus on two different populations.

We also analyzed the relationship between the country and educational levels of the researched populations. Articles in Europe include the whole range of educational levels with the main focus on the secondary level (8 out of the total of 11 studies). Comparatively, all articles in Asia focus on university students (N=4), and one of these articles also includes teachers. Studies from South America focus on teachers (N=2) and the university students (N=1).

Thematic categorization of the research

The following key themes and findings emerged in the current literature related to EMI/CLIL context and motivation. We illustrate each theme using specific key findings of some selected articles.

CLIL or EMI versus traditional classes

CLIL and EMI courses can potentially be difficult and time consuming for schools to implement, so it is important to understand the benefits of these types of courses when compared with traditional academic and English as a Foreign Language (EFL) courses.

In a comparative study of primary and secondary CLIL and non-CLIL students in Spain, Martínez Agudo (2020) found little correlation between achievement in CLIL courses and motivational variables, leading to the conclusion that not all motivational factors have the same impact on student learning. Lack of interest was found to be the variable with the greatest impact on student achievement. The author recommends that CLIL teachers adjust their approaches based on the observed needs of individual learners.

Halbach and Iwaniec (2020) investigated how CLIL affects students from different social strata. They suggested that students who are more willing to ‘put in the extra effort’ are attracted to CLIL learning options. Interviewed teachers felt that students’ desire to learn and ‘better themselves’ was a better predictor of CLIL success than socio-economic status (SES). Teachers also stated that the possibilities that learning English presents for students is a motivating force in itself; additionally, the characteristics developed by bilingual learning create opportunities for success, regardless of SES. The researchers also found that parental involvement in student learning was greater in bilingual school contexts.

Castellano-Risco, Alejo-González and Piquer-Píriz (2020) focused on the development of receptive vocabulary in the CLIL vs EFL learning context for

Spanish secondary-school learners. The CLIL group had a significantly larger receptive knowledge of the 2,000 most frequently used English words and the 570 most frequent academic English word families than their EFL counterparts. They also investigated differences between early, standard and late CLIL students (i.e. students who joined CLIL classes in early primary, late primary, or lower secondary) and concluded that there are no significant differences between these groups.

Jaekel (2020) examined language learning strategies used among CLIL and EFL students in Germany and found no significant effect.

Salvador-García et al. (2020) aimed to analyze the impact of CLIL in the context of physical education classes in Spain. Physical activity was higher in the experimental group (CLIL) than in the control group (non-CLIL group). Focusing on social relationships, the sociometric questionnaire results show that there were no statistically significant changes. However, interview data revealed that CLIL tasks promoted more cooperation and students tended to feel interpersonal relationships were improved.

Teacher factors

The studies in this category included teachers in the sample populations. The implementation of CLIL and EMI courses requires teachers who are not only experts in their academic field, but also possess the ability to present the material in English, and in the case of CLIL, demonstrate English language teaching skills as well.

Banegas and del Pozo Beamud (2020) found that engaging university EFL teachers in Colombia as developers of learning materials was a rewarding experience which increased both the knowledge and affective variables of the teachers. Teachers reported feeling engaged and excited about the materials with enhanced identities as both teachers and material creators.

A study by Han et al. (2020) revealed that Chinese academics have concerns about international students' lack of participation and attitudes of international students in EMI classrooms due to their lack of English skills. Supervisors also report challenges in communicating with international students, as both students and teachers experienced issues due to their English language proficiency. Also, some Chinese students expressed concerns regarding feelings of decreased academic rigor in EMI classes in order to accommodate international students.

A study by Kao (2020) included pre-service CLIL teachers in Taiwan. The findings from the study demonstrate that although there are many potential benefits of CLIL, both teacher training and classroom implementation of CLIL practices must be well planned in order to generate motivated and successful students.

Student attitudes

Research has shown that student attitudes toward learning are an influential aspect of the learning process. Studies in this category investigated the effects of CLIL on students' attitudes. For example, Dashkina et al. (2020) compared Russian university students in a CLIL course which combined integrated learning with a virtual environment and a non-CLIL group where the professional discipline and professional English were studied separately. They found that the CLIL approach led to better outcomes in terms of English language learning and content area

knowledge. Students also showed improved attitudes toward language learning, enhanced motivation, and increased academic interest.

A study by Fernández-Agüero and Hidalgo-McCabe (2020) focused on motivation in the context of Spanish secondary students. These students were streamed into two strands according to their linguistic competence. The two 'strands' exposed students to varying amounts of CLIL learning. Students in the high-exposure strand felt that they had more agency over their academic trajectory, whereas low-exposure strand students were less certain. Instrumental motivation was found to be an important factor and differed based on CLIL strand.

A study by Mearns, de Graaff and Coyle (2020) found that Dutch learners at the secondary level of education in bilingual settings were more motivated in all areas than students in traditional classes. The authors suggest that rather than CLIL generating motivation, it is more likely that students who choose to learn in a CLIL setting were already motivated learners.

Content learning achievement in the EMI context

Studies in this category have sought to determine the extent to which EMI impacts content learning achievement. Motivation for learning was studied as one of the possible factors contributing to content learning achievement (e.g., Rose et al., 2020) or as a variable influencing the choice of EMI classes (Reus, 2020).

Specifically, one of the key studies by Rose et al. (2020) found that predictors of success in EMI classes within a group of Japanese university students included English language knowledge and skills related to academic English.

Reus' (2020) study of engineering students at a Chilean university found that achievement differences in the EMI course were mainly predicted by student performance in previous courses. English aptitude was not measured before the course began, and the researcher posits that since students chose to take the EMI section of these classes, those with lower levels of English proficiency most likely opt for courses in their first language (L1).

Age of onset

We found one study which specifically focused on the effects of implementing a bilingual learning environment at different ages. Pfenninger (2020) researched students at the primary level in Switzerland to determine if implementing CLIL courses at earlier ages has any significant impact on linguistic factors. He found that students who began CLIL classes at the age of seven show similar L2 development to that of students who began earlier at age five. However, students who began CLIL classes at a later age, in this case the age of nine, fell behind the other groups in terms of the trajectories of their linguistic development.

Conclusion

Most of the articles related to CLIL/EMI motivation research came from Europe. Spain was found to be the most prolific country, producing a significant percentage of the research. However, South America is beginning to emerge as a potential CLIL and EMI research setting. All of the researched populations in South

America and Asia were students at the tertiary level of education or teachers. Whereas in Europe, we found a wider range of educational levels.

The lack of research from L1 English speaking countries was notable. CLIL courses could serve as an effective bridge to integrate English as a second language (ESL) students into traditional L1 English classrooms. Future research into CLIL and EMI motivation in L1 English speaking countries is recommended.

More studies of students at the lower education levels are also needed to understand how earlier exposure to CLIL classes impacts different populations of students regarding affective variables and achievement. Fernández-Agüero and Hidalgo-McCabe (2020) point out that CLIL courses often signal a privileged social economic status (SES) and an elite education. Normalization of CLIL as an option for students at all SES levels, heralded by more research into CLIL with students of lower SES, can potentially begin to change the educational landscape and provide the opportunity for more equitable education systems.

It should be noted that our narrow keyword search, as well as timespan and index restrictions, have provided just a sample of the literature regarding motivation in CLIL and EMI courses.

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Teachers' Life-history Narratives and Reform Policy Implementation at Classroom Level

Abstract

In many countries across the world, teaching is regarded as a noble profession. However, in some countries, it has degenerated into a low status occupation. This qualitative study explores the life-history of four Zimbabwean teachers and how they were implementing the New Curriculum Framework 2015-2022. The self-identity theory provides the framework for this life-story narrative. Data were collected using three-tier semi-structured interviews, non-participatory lessons observations and document analysis. Findings indicate that individuals join teaching for a myriad of reasons. For some it may not be their first, second, or even third career choice. Teachers' life histories seemed to promote or constrain reform implementation. It was interesting that one participant, who became a history teacher by accident appeared to enjoy the profession and embraced the new curriculum. Systematic career guidance and improved remuneration can assist in recruiting committed and gifted individuals to the teaching profession; thereby improving teacher retention and increasing chances of reform implementation.

Keywords: life-history narrative, career aspirations, self-identity, reform implementation, classroom practice

Introduction

In some countries teaching is a profession for those who fail to secure more lucrative careers in the private and public sectors. Low remuneration, long working hours, and low status impact negatively on the teaching profession in the USA (Klimek, 2019). Consequently, most American states face perennial shortages of licensed teachers because few university graduates are attracted to the profession.

Several studies reveal that careers with low remuneration and status attract less talented individuals (Klimek, 2019; Abdul-Rahaman et al., 2018; Shih, 2016). Conversely, careers that are perceived as better paying and prestigious (like engineering, medicine, and pharmacology) attract talented people, elevating the status of these professions. In Singapore, South Korea, and Taiwan, for instance, teachers are relatively well remunerated and enjoy high social status (Shih, 2016; Lim, 2014), attracting talented individuals to pursue careers in education.

In contrast, teachers in Africa earn very little and have low social status. In most African countries teachers earn less than US$100 per month (York, 2019). In Zimbabwe, for example, teachers earn an average of US$2.50 a day (Bulawayo 24News, 2019). Low salaries increase African teachers' economic hardships, demoralising them. This increases attrition out of the profession, undermining the quality of instruction.

Purpose of the paper

Numerous studies have investigated early career aspirations and why individuals become teachers (Memo, 2019; Bergmark et al., 2018; Han & Yin, 2016; Richardson & Watt, 2006). However, there is paucity of research on how teachers' life histories influence classroom practice. Jita (2004) explored how individuals' early life experiences shape classroom practice when they become teachers. The central argument in this paper is that teachers' life histories are resources that can promote reform implementation; or constraints that undermine change. The question driving this life-story narrative, therefore, is: How does a teacher's life-history promote or constrain reform implementation at classroom level?

Review of related literature

Career aspirations revolve around the type of work students want to do in future. One's career aspirations are generally influenced by personal interest and external factors like family background, school experiences and prospects for career advancement.

Motivation to join teaching

The reasons why individuals choose the teaching profession are multifarious. In developed countries, intrinsic and altruistic motivations appear to be the pull factors (Bergmark et al., 2018; Han & Yin, 2016). These include a desire to work with students, a drive to impart knowledge and offer service to society, and the opportunity to continue learning. However, extrinsic factors appear to motivate individuals to join teaching in the developing world. A regular salary, job security and career status are valued more than intrinsic and altruistic motives. Shih (2016, p. 44) observes that some teachers in the developing world "entered teaching by accident or were even forced to choose teaching because it was the only job available".

Different motivations to join teaching may be an indicator of the different socio-economic contexts in developed and developing countries. In the developed world school leavers have wider career choices, while in developing countries career opportunities are limited.

Teacher attrition

Worldwide, teacher attrition has been attributed to low remuneration, long working hours, heavy workloads, low status, and limited career advancement. This has resulted in teacher shortages in many countries. In the past decades, teacher shortages have been reported in the USA, Australia, UK, Germany, and Norway (Klimek, 2019). Taylor and Robinson (2019) estimate that more than 3.2 million trained teachers are needed worldwide, and two-thirds (2.2 million) of these vacancies are in Africa. "Nowhere in the world do teachers work in more challenging situations than deprived areas in African countries", remark Abdul-Rahaman et al. (2018, p. 103), making teaching less attractive to school leavers and university graduates.

Theoretical framework

This paper is illuminated by the self-identity theory because life-stories attempt to answer the question "who am I among others?" (Pan et al., 2017, p. 76). The theory can be divided into two related categories: individual self-identity and social self-identity. Individual self-identity is what separates a person from the other people in a social group. "Groups tell us who we are, and who we are not" (Scheepers & Ellemers, 2019, p. 3). So, social self-identity is how one sees him/herself in relation to other people.

The self-identity theory was selected as an appropriate framework for this study because participants were afforded the opportunity to narrate their early career aspirations and why/how they became teachers. Guided by the self-identity theory, the life-history narrative was selected as the research design for this study.

Methodology

A qualitative life-history narrative was adopted to explore teacher biographies and how they were implementing curriculum reform policy. Zhao (2008, p. 186) explains that: "A teacher's life-history in education refers to his or her formative experiences, which influence the ways in which teachers think about teaching and subsequently their actions in their practice."

Before undertaking fieldwork, ethical clearance was sought and granted by the University of the Free State and the Ministry of Education in Zimbabwe. Out of thirteen secondary schools in one school district in Harare, four schools were purposively sampled. One history teacher was selected from each school. The criteria were a minimum of five years' teaching experience and a degree in history pedagogy. Participants voluntarily participated in the study and were informed of their right to withdraw, if they so wished.

Interviews, lesson observations and document analysis were used to gather data over an eight-week period. Each teacher was interviewed at the pre-observation, intermittent and exit stages, culminating in 12 interviews. Non-participatory lesson observations were conducted. The aim was to observe each teacher twice a week. However, because of unanticipated disruptions a total of 47 lessons were observed. The New Curriculum Framework 2015-2022 and History Syllabus 4044 were analysed to understand reform expectations.

Data were transcribed, coded, and categorised into themes. Intra-case analysis was used to construct each teacher's life-story and how s/he was implementing the new curriculum.

Findings

Two themes emerged during data analysis: early career aspirations and the influence of life-history on reform implementation. These themes were used to construct each teacher's life-story.

The story of Angela: Teacher by default

Early career aspirations

Angela had a Master's degree in Development Studies, a Bachelor of Arts with Education in History, and 10 years' teaching experience. She recounted that: "At secondary school history was my favourite subject because I wanted to be a lawyer, a police officer, or a nurse. I never thought of teaching."

How she missed her occupational dreams sounds like a fairy tale. After completing Advanced Level in 2001, Angela could not secure a place to study law at the University of Zimbabwe. With her first career choice frustrated, she joined the police force. But she withdrew after one week of training because she was offered a more lucrative nursing opportunity in the United Kingdom. Unfortunately, her visa was delayed. She lost the chance. She then enrolled for a four-year degree in History and Education and began her teaching career in January 2007.

Influence of life-history on reform implementation

Angela was unhappy with her identity as a teacher. She lamented: "Sometimes I regret because of the low remuneration in the profession… I feel that if I had become a police officer, with all my degrees, I could have moved up the ranks." She lambasted the new curriculum as a diktat:

> *Yes, we are implementing because that is what we are instructed to do. But deep down in our hearts we are not convinced… and the whole effort is a failure because teachers have not changed their practice. The new syllabus requires us to use the internet and interactive boards, but all these things are not available.*

In the 13 lesson observations Angela's efforts to use learner-centric pedagogy appeared cosmetic. She always reverted to teacher-talk and dictation, attributing her failure to reform practice to resource shortages.

In the exit interview she stressed that: "To be honest, teaching is no longer in me. I still have ambitions. I am thinking of lecturing. I want to leave the classroom..."

The case of Bessie: History teacher by accident

Early career aspirations

Bessie had a Diploma in Education, a Bachelor of Education in History and ten years' experience. She remembered that: "When I was in secondary school, I used to hate history. I was very quiet... I was not born a teacher." She explained why she joined the profession:

> *I became a teacher because of the rural areas I grew up in. What you only saw was the teacher. At the end of the month you saw them wearing new clothes, every time you went into the staffroom you saw them eating delicious food… They ended up being my role models.*

It is interesting that Bessie was teaching a subject she used to hate. She narrated that: "The way our history teacher taught was monotonous. He would give us voluminous notes and assign someone who was eloquent to dictate the notes." Despite her hatred of history, she passed it.

The turning point in Bessie's attitude towards history occurred after completing school. She recalled that: "I decided to become a history teacher in 2004 when I was doing temporary teaching. I was asked to teach history and realised history was an interesting subject..."

Influence of life-history on reform implementation

Bessie embraced the new curriculum when it was introduced in January 2017 because "The new methods in the new curriculum are familiar as I covered them at university." But in the 10 lessons she was observed, she often abandoned learner-centred methods once students failed to respond to her questions. She would remark: "So, you don't want to talk? Then take the following notes." And she would start dictating. Although she had a positive attitude towards the new curriculum, Bessie failed to implement its pedagogical requirements, maybe because of her late turning point to history.

In the exit interview she summarised her identity as a history teacher: "Now I am enjoying teaching. I can manage pupils. I think teachers can be trained, like me. I really was trained to become one."

The story of David: A preordained future

Early career aspirations

The holder of a Master's in Educational Management, a Bachelor's in History, and a Diploma in Education; David had 25 years' teaching experience. He recalled that: "At one point I wanted to be a policeman. I wanted to be a Patrol Officer. During those days Patrol Officers had large motorbikes and I really liked their uniform." But with the movement of time this dream fizzled. He explained why: "When I was growing up my father used to say: 'This one is going to be a teacher, like me.' This made me aspire to be a teacher at an early age."

David's family background and secondary education were instrumental in making him a teacher. He narrated that: "My father always wanted me to be a teacher. I also liked the way Mr. Moyo [pseudonym] was teaching us. I thought one day I would like to be a history teacher, like him..." Thus, David was directly influenced by his father and history teacher to become a teacher.

Influence of life-history on reform implementation

Although he joined teaching willingly as a first career choice, David's classroom practice was largely at variance with the learner-centred expectations of the new curriculum. In the nine lessons he was observed teaching, he used some learner-centric pedagogy, but his practice remained teacher dominated. He justified his methodology: "The teacher remains the master of the subject. Some of the textbooks students use lack facts and that is where the knowledge of the teacher becomes very important."

For David implementing reform was a matter of choice but becoming a teacher was preordained. He was proud that "teaching is a legacy passed on by my father and I have the duty to protect and perpetuate the family tradition".

The case of Emmy: A legacy bequeathed

Early career aspirations

In this study Emmy stood out as a history teacher cut from a different block of wood. She had eleven years' experience and was the holder of a Bachelor of Arts Honours' in History, and a Post-Graduate Diploma in Education. For Emmy,

teaching history was a dream come true. “I am a teacher, born a teacher by nature. I enjoy teaching”, she said in the pre-observation interview. She viewed teaching history as a legacy bequeathed by her brother.

She articulated her life-story: “When I was in secondary school my brother was a history teacher, so I used to have all the textbooks I needed … My brother influenced me to be a history teacher. I cannot rule that out. He still is my role model.” Emmy appeared to have an emotional attachment to her job as a history teacher.

Influence of life-history on reform implementation

In the 15 lessons Emmy was observed teaching, she engaged students in the study of primary and secondary sources. She used text, picture, and map study; individual and group presentations; role playing; debate and discussions, as recommended in the reform documents. Her approach was that students write notes on their own before a topic was taught. The lessons then explored the topic in-depth using learner-centred activities.

Emmy was the only teacher in this study who did not use the lecture method, dictate, or write notes on the chalkboard. “There is no room for dictation in the new curriculum”, she remarked. Her classroom practice lived up to her word and conformed with reform prescriptions. “I think my background is useful in explaining my classroom practice”, she said in the exit interview. “I have my honours’ degree in history. I am into history, I love it.” Her classroom practice vindicated her.

Discussion

The purpose of this life-history narrative was to examine how individuals’ life histories can be resources or constraints for reform implementation. Some findings were unique and interesting. For instance, David’s story showed that the fulfilment of one’s career aspirations does not necessarily make one a reform-oriented teacher. David became a history teacher by choice and was aware that the new history curriculum required him to used learner-centred pedagogy. But he still believed that the history teacher remains the master of the subject, undermining reform policy. Bessie became a history teacher by accident. As a secondary school student, she hated history. But she now enjoyed teaching history and embraced the new curriculum, though she struggled to implement its pedagogical prescriptions.

However, some findings echoed previous studies. Richardson and Watt (2006) established that teachers who are intrinsically motivated to join the profession are more likely to adopt learner-centred practice. Teaching was a first career choice for Emmy, and she practiced learner-centric pedagogy. Angela was in the classroom “by default” (Zhao, 2008, p. 189). Zhao uses this concept to denote a scenario in which an individual is forced by circumstances to become a teacher. Angela studied history education because her career aspirations to become a lawyer, a police officer or a nurse were frustrated. This may partly explain her reluctance to implement reform policy. Angela’s desire to leave teaching resonates with previous studies (Martin & Mulvihill, 2016; Klimek, 2019) which established that demoralised teachers look for an opportunity to exit the profession in search for greener pastures.

Conclusion

Teachers' life histories can be resources that promote reform implementation or constraints that undermine it. It was interesting that one participant who joined teaching as a first career choice was less receptive to change, while the other who became a history teacher by accident embraced curriculum reform. Future studies can explore the other factors that work in tandem with teacher biography to promote or hinder reform implementation. Systematic career guidance and improved remuneration can assist in recruiting gifted and committed individuals to teaching, thereby improving teacher retention and commitment to reform implementation.

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Leadership Styles that Would Enable School Leaders to Support the Wellbeing of Teachers during COVID-19

Abstract

In times of crisis, people look up to their leaders and expect that they would minimise the impact of the crisis at hand. Leaders in such situations must grasp and address the crisis while maintaining a sense of normality. In this research, we drew on data from a literature search to answer the following question: What can be learnt from studies on teacher wellbeing during the COVID-19 crisis, that can help us to determine the leadership style needed to support teacher wellbeing? A literature search was conducted to create a database of articles that focused on teacher wellbeing during the COVID-19 crisis and school leadership. The following four keywords/phrases were used during the search: crisis management in schools; crisis management during COVID-19 in schools; leadership styles for crisis management; and leadership styles in support of teacher wellbeing during crisis situations. The review included both national and international studies. This paper highlights two leadership best practices for navigating teacher wellbeing challenges posed by the coronavirus pandemic, namely distributed leadership and compassionate leadership.

Keywords: COVID-19, teacher wellbeing, school leadership during crisis situations, leadership styles

Introduction

It is agreed that school leadership in times of crisis differs from leadership required under normal circumstances. The COVID-19 pandemic has manifested as a multifaceted crisis that calls for exceptional leadership. This pandemic has disrupted schooling globally. Although the outbreak of COVID-19 has not exclusively been a public health crisis, it has been a serious psychosocial issue for teachers. Teacher wellbeing has been greatly impacted by this pandemic due to its devastating effect at a personal level, social distancing and remote learning. According to the South African Council for Educators (SACE, 2020), the unprecedented COVID-19 pandemic has brought fear, grief, threat, disillusionment and concerns to the education system and the teaching profession in particular. These have had a bearing on teachers. Teacher wellbeing is important because it contributes to work satisfaction and productivity and, most importantly, has a positive influence on student wellbeing and academic achievement (Spilt, Koomen & Thijs, 2011). This research focused on teacher wellbeing as work related and domain specific, as opposed to general wellbeing, which is about open, engaged and healthy functioning. Work-related teacher wellbeing refers to individuals' positive evaluations of and healthy functioning in their work environment (Van Horn et al., 2004). Good leadership that will enable followers to be more responsive to change is needed now more than ever. We believe that school leaders must have cultivated a new set of leadership competencies for dealing with the COVID-19 crisis, which

they never have encountered before, in order for them to support teacher wellbeing. Leaders influence those around them in order to reap maximum benefits. However, evidence on school leadership practices in a pandemic is non-existent; this is unprecedented territory with few education signposts, points of reference, or recent experience to draw upon. As leadership is about influence, this research includes principals, deputy principals, heads of departments (HoDs), and senior teachers in its definition of school leaders.

Understanding factors affecting teacher wellbeing during the COVID-19 crisis to determine the leadership styles required to support teacher wellbeing is important: poor wellbeing can have serious consequences for the teaching profession if not attended to. For example, it can lead to teachers leaving the profession, which can be financially costly for schools and the educational system (Carver-Thomas & Darling-Hammond, 2017) and detrimental to student achievements. Researchers acknowledge that teachers work in difficult circumstances that can negatively affect their wellbeing. Teachers face competitive demands even under normal circumstances, which can lead to stress and anxiety, and this situation is worsened by crises. There is an increasing awareness that employee wellbeing is vital for any organisation. As earlier indicated, when the wellbeing of teachers is not attended to, it becomes a challenge that compromises the quality of education. In this paper, we argue that school leaders should have distinct leadership styles in order to respond to the COVID-19 pandemic.

Most studies that have been conducted in South Africa focus on digital transformation of education during COVID-19 (Mhlanga & Moloi, 2020; Mahaye, 2020). A study on teacher wellbeing by Mungroo (2020) suggests certain coping strategies that can mitigate the effects of the pandemic. Earlier research on teacher wellbeing advocate for self-care strategies. Others recommend adaptability, which entails adjusting thoughts, actions, and emotions to effectively navigate new, changing, or uncertain situations (Martin et al., 2012). Self-care is important; however, the burden of ill-being cannot be put entirely on teachers. Teachers should be supported at individual and collective levels. This research adds to the debate on understanding the kind of leadership that is needed during crisis situations.

Literature review: Factors affecting the wellbeing of teachers during the COVID-19 pandemic

Even before COVID-19, teachers worked under poor environmental conditions, including poor infrastructure, overcrowded classrooms, lack of resources and high workload, which are causes of teacher distress (Mungroo, 2020). Additionally, long before COVID-19 disrupted schools, some teachers were already at risk of burnout. COVID-19 seems to have aggravated the situation as the paragraphs below indicate.

The issue of social distancing, which was unplanned, made teachers' work change drastically so as to accommodate the current situation (Kaden, 2020). Social distancing was enforced in over 109 countries across the world in response to the COVID-19 pandemic; this resulted in the introduction of technology-based pedagogy by some governments to ensure that learners had access to learning materials while staying at home (Mahaye, 2020). The efficiency of transitioning to remote learning is dependent on learner and teacher preparedness, overall learner support infrastructure and technology tools. Developing countries reported

challenges integrating digital resources into educational practice, which demanded significant effort from teachers, causing insecurity in teaching habits and routines. Digital illiteracy and inequality in access to technology is a major concern in African countries. Although the government of South Africa ensured the availability of electronic readers via all major cell phone networks as well as the 2Enable app as a freely downloadable educational platform with more than 2 000 electronic readers in the indigenous languages of the country (Department of Basic Education, 2020), some pupils still did not have access due to poverty (Mhlanga & Moloi, 2020). Teachers cannot solve these problems of inequity immediately. This sudden shift from face-to-face teaching to remote learning affected teacher wellbeing as it demanded great efforts in teaching habits and routines. Teachers had stable working patterns before COVID-19; remote teaching caused a deviation from their working patterns. Moreover, teachers were dealing with these issues on their own; social isolation and reduced usual social support may have had a negative impact on their mental health and wellbeing. According to Dabrowski (2020) the abrupt lack of contact due to COVID-19 affects teacher emotions. Teachers experience a sense of loss not seeing their students in person, resulting in a kind of grieving in some teachers who generally were not being acknowledged or supported.

Working from home has added more responsibilities as teachers must balance work with personal life. Dabrowski (2020) argues that this affects teacher wellbeing negatively because they are "on call" day and night. The challenges with increased workload were due to changes in their teaching patterns (i.e., the shift to online teaching and the need to master technological strategies). Teachers did not have time to prepare for this sudden change. Lockdown resulted in many hours of work, causing challenges owing to the obstacles created by work-life imbalance. Leisure and family time are reduced. Sensible work-life balance can become impossible to maintain in such situations on account of unplanned heavy workload.

There was a concern about teachers over the age of 60 and those with comorbidities. The Department of Basic Education reported to have measures in place to accommodate teachers who were at high risk, had comorbidities, or were over the age of 60. Temporary teachers were employed to help with additional classes. Anxiety amongst teachers grew as schools were perceived as sites of infection. Fears of being infected worsened after some schools were temporarily shut in June when coronavirus cases were reported (Isilow, 2020). In South Africa, teachers who were on comorbidity absence, over the age of 60, and had been working from home, returned to work in September 2020 as the country moved to lockdown level 1. Teachers aged 60 years and older could be breadwinners due to the high unemployment rate in the country. As they are a vulnerable group, fears of being infected could worsen their health. Feelings of anxiety and fear could trigger negative emotions in those teachers.

Lack of personal protective equipment (PPE) and often poor hygiene measures in most disadvantaged schools aggravated anxiety and fear among teachers. Not all schools have facilities with access to water and ablutions where learners can regularly wash hands, which increases the risk of teachers getting infected. Data show that children may be carriers and spreaders of COVID-19, so teachers' health and wellbeing may be compromised if they are not provided with PPE. According to the *Mail and Guardian* (Macupe, 2020), some schools in KwaZulu-Natal, one of the

provinces of South Africa, could not open in June 2020 after the hard lockdown was lifted as PPE was not delivered on time. Although data on transmission in schools are sparse, the lack of PPE was a cause for concern to teachers due to a risk to their physical health.

In a study conducted by Kim, Oxley and Asbury (2021), uncertainty over government guidance to schools was indicated as a consistent detrimental factor to participating teachers' wellbeing. Currently, the decision to close and open schools depends on the rate of the spread of COVID-19 cases. Frustrations stem from a lack of consultation with the education community and last-minute decision-making. For instance, first there was uncertainty about a "phased approach" to the opening of schools as South Africa was approaching lockdown level 4 during the first wave. Then there was confusion about procedures for dealing with the vast number of learners that each teacher was responsible for. In South Africa, as in all other low-income countries, the learner–teacher ratio is 50 and above. Uncertainty can heighten anxiety. Stress due to how to teach effectively while ensuring social distance and constant sanitisation, could be worsened by a lack of resources such as classes and furniture to accommodate a small number in each class; well-ventilated classrooms; extra teachers; and running water and ablution facilities. In such situations, teachers are unable to plan their lives easily as they do not know when or how changes may occur as a result of unpredictable variations.

In summary, it can be argued that both reopening schools and keeping them closed carry risks that actively require mitigation of teacher wellbeing. In all these instances, there are multiple indicators and multiple causes of the negative effects on teacher wellbeing.

In the foregoing paragraphs, we highlighted the negative effects due to rapid changes in teaching and learning brought about by the COVID-19 pandemic. Firstly, COVID-19 had negative consequences for schools as organisations as they could no longer offer the usual support to teachers. Secondly, social wellbeing was affected as maintaining social connections and relationships became impossible due to lockdown. Social wellbeing is believed to be the key component of a person's overall health. Thirdly, work-life imbalance caused by increased workload contributed to emotional and psychological ill-health.

The type of leadership required to support teacher wellbeing

The lesson we learnt from the data on teacher wellbeing is that the demands on leadership during a crisis include dealing with events of the crisis as they unfold, emotions, and consequences while also trying to stabilise the institution by looking and planning beyond the crisis.

First, school leaders should keep the team together, whether teachers are at school or home, during lockdown. Teachers are used to working in teams and collaborating with other teachers, whether they are planning and strategising or deliberating on problems and challenges the school faces. As teams are essential, especially during the COVID-19 crisis, school leaders must create a platform for teams to flourish. Teamwork during a crisis is vital to strengthen relationships. Focused attention on teamwork is required for teachers to maintain resilience and sustain coordinated performance, which, in turn, can alleviate the stress caused by a heavy workload and work-life imbalance. These teams can be used for multiple

purposes, including ensuring continuity of teaching, support for teachers to manage workload, and social support. Team communication could mitigate social isolation. School leaders' role is twofold: to create an environment for continuation of the teams that were in existence before COVID-19 and to synergise. Teams can communicate using Facebook, WhatsApp chats, video calls and other internet platforms where internet connectivity is not a challenge. As stress levels are high for all in a crisis, the leadership responsibility of these teams can be distributed. The school leader cannot work alone because a top-down hierarchical approach is unlikely to be effective in a volatile, uncertain, and complex environment created by COVID-19. Moreover, school leaders should also look after their own wellbeing. Thus, distributing leadership responsibilities is more effective than other leadership approaches in times of crisis (Berjaoui & Karami-Akkary, 2019). School leaders should be willing to delegate authority, capitalise on expertise within the school, and create infrastructure so as to employ the leadership of a number of teachers.

The current situation is characterised by issues that affect teachers emotionally; therefore, school leaders should lead with compassion and be supportive to teachers. Dealing with teachers who are overburdened with new responsibilities of managing their learners and their own children's work requires a sense of empathy and caring. Such situations kindle feelings of helplessness. Sokal, Trudel and Babb (2020) suggest addressing teachers' thoughts and feelings about remote teaching as well as their exhaustion if their continued progression towards burnout can be mitigated. Continuity of teaching and learning depends on how teachers are supported by prioritising their mental health, nurturing their combined self-confidence, and understanding their workload. Times of crisis call for tough decisions; however, compassion can be a valuable tool for mitigating anxiety and ensuring that the team stays on track. All strategies and actions to teach during and after lockdown will fall short if not accompanied by empathy. Compassionate leadership is important for alleviating organisational stress. This could mean that the school leader should be in contact with each member of the staff (during lockdown), engage in active listening without judging in order to understand what they are experiencing and assist them in creating pathways to a healthy wellbeing. For teachers to carry out their duties and face the pressures caused by the COVID-19 crisis, they need emotional support from their leaders.

Conclusion

The literature review on teacher wellbeing provided an opportunity to understand leadership styles that are needed to support their wellbeing. One of the lessons that can be learnt from the experiences of COVID-19 in 2020 is that fostering belonging and inclusion to unify the school as an organisation is important. Devising means of keeping teachers together, even during lockdown, to assist in navigating times of crisis becomes crucial. Social isolation demands an establishment of a collaborative culture in order to keep sustain teaching and learning activities. Principals mobilise others to lead through collective engagement leading to joint practice. Distributive leadership becomes key in ensuring effectiveness of remote leadership. The distributive leadership in this research is linked to compassionate leadership. It is deemed necessary to tune into and

understanding teachers' emotional makeup and needs, as this is fundamental in supporting personal transitions through well-functioning relationships.

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Ensuring the Continuation of School Feeding Programmes during COVID-19 Pandemic: A Case of "New Normal" Management

Abstract

The issue of school feeding is placed at the top of global agenda currently more than ever before. Challenges imposed by COVID-19 have created an opportunity to broaden and deepen debates focusing around the significance of school feeding programmes internationally. Throughout the duration of the lockdown period, billions of learners worldwide were no longer receiving school meals regularly, thus negatively impacting their health and wellbeing. The aims of this paper were to highlight: challenges that school leaders were faced with, in ensuring that learners were fed during the pandemic and the type of management that would enable them to continue feeding learners even during the crisis. The "new normal" management emerged as three modalities that were introduced by the Department of Basic Education and were implemented to ensure continuity of school feeding. The adaptive and situational leadership approach seemed to be more suitable, as the traditional way of managing was no longer adequate in meeting the demands of feeding learners in a crisis situation.

Keywords: school meals, school leadership, adaptive leadership, situational leadership

Introduction

The suspension of classes in March 2020 as a preventative measure to curb the spread of COVID-19, negatively affected the majority of learners globally in various ways. Borkowski et al. (2021) report that school closures due to COVID-19 disrupted the normal distribution channels through which school meal programmes operate, leaving many children without this vital source of nourishment. When schools are open learners are guaranteed at least one meal per day. For some children, attending school is not just an opportunity to learn, but their only chance of getting a meal. There are millions of learners in South Africa that depend on the meal/s they receive from their schools. The numbers keep increasing as more learners are added to the programme every year. Many scholars believe that school feeding programmes have a positive impact on education access and outcomes, leading to higher attendance rate, attentiveness in class and better academic performance (Devereux et al., 2018). Borkowski et al. (2021) argue that school feeding programmes may be a critical part of encouraging children back to school and keeping them enrolled after the crisis. However, other researchers have noted the effect on food security and nutrition resulting in reduced rates of child malnutrition (Labadarios et al., 2011). School feeding provides a crucial, widespread safety net that supports vulnerable children and their families. During lockdown caused by COVID-19 crisis learners could not benefit from the programme in any

form, due to school closures. The assumption was that leaners will benefit from the food parcels that were distributed by non-governmental organisations to the deserving members of communities. The school feeding programmes are not unique to South Africa. The developing countries feed millions of learners in schools yearly.

As a result of lockdown children spent their time more at home, rather than at school as is the case when schools are open. More food was needed; children in the school feeding programme eat less at home as (the) other meal/s is/are provided at schools. This became a challenge for many families who live in poverty, as they could not offer their children a meal. Even before COVID-19, many South African households faced a total lack of income, reduced income, or uncertainty around retrenchments and unemployment. Unemployment rate increased to 32.5% in the 4th quarter of 2020 compared to 30.8% during the 4th quarter of 2019 (Statistics South Africa, 2020). In addition, the national estimate of child multidimensional poverty for all children (aged 0–17) according to Statistics South Africa (2020) was 62.1%. These children were located in income-poor families. As these figures are alarming, the outcry for the Department of Basic Education to devise means for poor learners to have access to the school nutrition programme could be justified, if food insecurity was to be curbed.

It has always been the responsibility of school leaders to manage the provision of the feeding programme in their schools. Precisely, school principals have to manage the National School Nutrition Programme and appoint nutrition coordinators to assist them (Department of Basic Education, 2014). School leaders in this research refer to principals, their deputies and school nutrition programme coordinators. The management of this programme includes: budgeting, managing allocated funds, and the sourcing, buying, transporting and storing of food (Mawela & van den Berg, 2020). School leaders had a huge responsibility in ensuring that the management of this programme is effective even under difficult situations caused by the COVID-19 crisis. The focus of this paper therefore is on the new challenges that school leaders are faced with in ensuring that learners are fed and the type of management they provided. The section below elaborates on the developments that led to schools providing meals during lockdown.

Background

School feeding is one of the activities that are part of school health promotion. The school nutrition programme caters for more than 9.6 million of South Africa's most vulnerable school children across South Africa (Chaskalson, 2020) every day. The programme operates in all schools residing in poor communities in the country, providing one or two meals depending on the location of the school. It is worth noting that the management of the implementation of the school feeding programme had challenges even before the lockdown. However, lockdown exacerbated these problems. The existing challenges were: late delivery of meals; inadequate resources; a breakdown in communication between caterers and teachers; poor management strategies and the lack of monitoring mechanisms (Munje & Jita, 2019). When the COVID-19 came about, schools were still struggling with these encounters and the new trials commenced as indicated in the section below.

The closing of schools due to COVID-19 crisis and interruptions in the provision of school feeding are not unique to South Africa. For instance, at least 310 million school children were missing school meals in 162 countries (World Food Programme, 2020). The massive impact of school closures highlighted the importance of school feeding programmes. Consequently, many countries and international organizations have adapted their school feeding programmes. However, the process of modifying the provision of school feeding, aligning it with the newly changed school procedures was not easy. The Equal Education Law Centre (EELC) and SECTION 27 took the Department of Basic Education to court forcing it to offer food to all learners, even while they were still at home (Broughton, 2020). On 16 July, the court declared that the Minister of Basic Education had a constitutional and statutory duty to ensure that the feeding programme provides a daily meal to all qualifying learners. Plans and programmes were to be submitted to the court regarding how they will reinstate the programme (Pikoli, 2020). The court order necessitated different provinces to make their own arrangements of ensuring that learners get their meals. Subsequently, the school managers were instructed to ensure that all learners get their meals during lockdown. As not all grades attended classes during lockdown (Spaull, 2020) strategies were to be put in place to feed leaners that were learning from home. The new challenges that the school leaders were faced with in ensuring provision of meals are discussed below.

Challenges in providing leadership for feeding during a crisis

The feeding modalities that all schools had to adhere to consisted of three options: to serve food to learners at school; learners to collect food; deliver school feeding as food parcels. Schools were familiar with the first option. Serving food to learners at school was what they had been doing ever since the start of the programme. They had measures in place to safeguard the smooth implementation of the programme. The effectiveness of the first option was dependent on leaners' ability to come to school. Learners could not turn up to collect food in one of the provinces. It emerged that out of the expected 1.6 million pupils only 38,594 went to schools to collect food (Govender, 2020). This was confirmed by Damons (2020) who mentioned rotating timetables as one of the reasons why meals were not reaching learners on the days they were at home (Damons, 2020). Food was prepared as per the number of learners that were fed in each school. The non-arrival of learners to collect the food meant that the school leaders had to take a decision on what to do with the food that was already prepared. In addition, other contingency measures had to be developed by school leaders. They had to think on their feet in adopting innovative approaches to provide meals, while practicing appropriate social distancing.

In order to reach out to learners, schools in the Gauteng Province decided that those who used transport and who were not yet back at school, be picked up at 10am at their various pick-up points to collect their food from school (Mabuza, 2020). In order for this arrangement to materialise, school leaders were to communicate with parents and ensure that the information reached all learners. Moreover, the logistics with regards to the transport for such learners was the responsibility of the school leaders. This had financial implications. Apparently, non-provision of scholar

transport for learners that were not phased in to access these meals, led to the failure of this approach (Mabuza, 2020).

Two provinces were reported to be using a hybrid model. Learners who were not part of those who started attending school on 8 June, were either coming to school to get food, or collecting pre-packed meals, or given food parcels to take home to cook (Pikoli, 2020). The two provinces are mostly rural, learners live far away from the school so the option of giving them food hampers was more feasible. The strategy of the food parcels was more appropriate for the rural context. The food kits can be offered weekly or monthly, this reduces the amount of travel required for leaners. However, the food kits have to be packed and the contents should be shelf-stable, in order for the food not to expire before the next date of collection. Moreover, this model, as well as those that have been discussed above cannot be effective if the food supply is disrupted.

In some instances during lockdown, the teachers were at their homes due to social distancing. It was then the responsibility of the principal, together with the coordinator for school feeding to provide food to learners. This would be done with the help of those food handlers who would be willing to avail themselves. This would mean fewer numbers of people that were to cater for leaners.

"New normal" management of school feeding

The "new normal" brought about these three modalities that demanded for messy, trial and error leadership, leading to the emergence of the "new normal management". In the old normal the management of the implementation of school feeding was mainly administrative, including among others; appointing a coordinator and food handlers, allocating a room for preparation of food, providing kitchen appliances, ordering food supplies and making sure the supplies arrive on time. Specifically, administration has to do with, arrangement of the human and material resources and carefully using them systematically for the achievement of the goals of school feeding. School managers had been responsible for these activities for years, allowing them to adapt to the day-to-day activities of managing the programme and affording them time to deal with the challenges. Moreover, there had been a training series provided for principals, coordinators and food handlers over the years. The challenges that they had in the past would seem easily achievable, compared with what they are faced with at present. They have to make sense of the modalities that have been presented to them by the Department of Basic Education, determine the feasibility of each, based on the context of their schools and decide on the best method of feeding provision for learners in their schools. This is new ground for school leaders. The "new normal" management of school feeding means a shift from the traditional way of managing the programme, into something that is more adaptive to changes that are dictated from elsewhere. For school leaders to be effective in their role, they have to be willing to adapt to the new ways of providing food to learners, so as to continue their commitment.

In order for school leaders to adjust to the new ways of food provision, they have to be aware of these situations of change, so as to assist their followers to adapt to them. The "new normal" management of the feeding scheme necessitates adaptive leadership among school leaders. In this paper adaptive leadership refers to a focus on contingencies as they develop and the changing of decisions and actions, aligning

them with the problems encountered in the provision of school feeding in a crisis situation. As adaptive leadership focuses on process, not a person, the model employs the knowledge of all who have a vested interest (Randall & Coakley, 2007) in implementing solutions to the challenges they face. Moreover, as the COVID-19 crisis is so far-reaching and has developed so suddenly and unexpectedly, it becomes very difficult even for the Department of Education to make predictions that are realistic.

When the "new normal" started to surface it transposed ways and processes that school leaders previously held. There are two distinct aspects that are new in the "new normal" of managing the feeding of learners. The first aspect pertains to feeding learners that are learning remotely. School leaders have to find ways to get meals to the learners where they stay. The management of this method includes communication with parents and learners regarding pick-up points, packaging the food and having food handlers handing out the food to learners that attend the pick-up points. The second aspect refers to issuing food parcels to learners. Food parcels would last for longer periods than daily food packs. The additional logistics to the ones indicated above, include changing the whole system of ordering food. For instance, in the past food was ordered in larger packages to last for the whole month, whilst now the order has to be for each learner. The situations under which each modality will be applicable, differ. Understanding the situation has always been regarded as imperative when dealing with a crisis state. In considering the suitable mode of feeding contextual factors have to be taken into consideration.

Conclusion

The need for provision of meals for learners has increased during COVID-19 due to school closures and is exacerbated by high rate of unemployment and retrenchments. However, this paper highlighted challenges that school leaders are faced with in managing the implementation of feeding of learners during COVID-19. In addition, new ways of feeding learners had to be developed in order to respond to the changes caused by the crisis. As strategies were formulated, it became apparent that the traditional way of proving meals will not meet the demands of feeding learners during a crisis. A "new normal management" started to emerge.

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Exploring Challenges of Supervising Postgraduate Students in Open Distance Learning in Higher Education Settings

Abstract

The paper explores the challenges of supervising postgraduate students in open distance learning in higher education. The researcher argues that inaccessibility of information and services provided by supervisors, can contribute to a low quality of students' success. The responsibility of institutions is to ensure that facilities provided to supervisors are always appropriate in order to supervise students in distance education. Moore's Theory of Transactional Distance assumes that distance is a pedagogical, not geographic phenomenon. It raises questions about understandings and perceptions that might lead to communication gaps. The challenges in distance postgraduate supervision originate from the spatial and temporal distance and disconnection between the supervisor and student. It is assumed that some universities may not have adequate staff with PhDs to supervise students. However, the challenges of supervising postgraduate students are the lack of supervision skills, changing of supervisors, and the mode of supervision employed.

Keywords: supervision, postgraduate, students, open distance, learning, environment

Introduction

The paper explores the challenges of supervising postgraduate students in an open distance learning (ODL) environment. The argument in this paper emanates from the fact that some researchers have suggested that postgraduate supervision itself needs revitalizing to keep it current with the need for academic expertise and rigour. Van der Laan et al. (2021) believe that the inadequacies in supervision are associated with evidence that: postgraduate student attrition and failure to compete metrics are at worryingly low levels; student attrition is somewhat related to inadequate supervisory and institutional support; and university capacity to adequately support students is limited, especially within the context of increasing demand for certain postgraduate programmes. According to the above authors, postgraduate research students make a valuable intellectual contribution to the research efforts of universities. In many instances, they enhance the research outputs and specialization of the supervising faculty.

Method

The paper is qualitative in nature and follows an interpretivist paradigm. This paper reviewed literature on supervision from the point of view of supervision of postgraduate students in an ODL environment, using Moore's Theory of Transactional Distance as a lens. Then it offers some reflections on supervision. The pressures upon supervision of students at a distance are related to issues encountered in distance supervision. In the Theory of Transactional Distance, Moore posits that

in distance learning scenarios, the separation between the supervisor and students can lead to communication gaps, a psychological space of potential misunderstandings between the behaviours of supervisors and those of the students (Falloon, 2011). The paper uses Moore's theory of transactional distance in understanding supervision of postgraduate students at a distance. In this paper, transactional distance will refer to the psychological space of potential misunderstanding between the behaviours of people involved in distance education in case supervision due to the physical separation. Moore built his theoretical models based on the interplay of three concepts, 'dialogue, structure and autonomy' (Wang & Liu, 2003). Distance supervision ought to be understood as the universe of supervisor-student relationships that exist when students and supervisors are separated by space and/or by time. This explanation includes both synchronous and asynchronous delivery modes. Transactional distance theory is important conceptually, since it proposes that the essential distance in distance supervision is transactional, not spatial or temporal. Advances in communications technology, which made synchronous and asynchronous interaction readily available can easily enable interaction to become a key factor in distance supervision (Gorsky & Caspi, 2005). Moore's Theory of Transactional Distance assumes that distance is a pedagogical, not geographic phenomenon. It is understandings and perceptions that might lead to a communication gap or a psychological space of potential misunderstandings between the supervisor and student. Moore also suggests that this distance must be overcome if effective, deliberate, planned supervision is to occur in the supervision of students (Falloon, 2011).

Purpose of the paper

The paper aims to explore the challenges pertaining to supervision of postgraduate students in open and distance learning (ODL) modes that are likely to limit the success of both supervisors and postgraduate students.

Research question

The overarching question this paper is trying to explore is: To what extent do we know about the challenges facing higher education institutions (HEIs) in supervising postgraduate students in open distance learning (ODL) environment? Choices for methods of supervision undoubtedly have benefits for supervision of postgraduate students who live at a distance from the university. Because of the potential complexity of objectives and roles in supervision, a structured agreement appears to be an important part of the effective supervision relationship. Without this supervision can easily degenerate into unstructured socialization, and also having session objectives is important. Mutual respect and trust are an essential base for the supervision relationship, with detailed feedback appear to be critical to supervision at a distance (Kavanagh et al., 2002).

Importance of communication

Maintaining good communication with distance students can be difficult, particularly with respect to striking a balance between support and harassment.

Email or telephone contact every month can be helpful and more likely to accord with the comfort values of the student trying to develop an appropriate pattern of integrating masters/doctoral study with the rest of life (Watts, 2008). The word communication comes from the Greek 'communis' which means common (Ferreira & Pellegrini, 2019). Communication represents a strategic tool to strengthen the organizational culture and the identity of the institution. The communication process in organizations basically involves administrative communication, barriers and communication vehicles, formal and informal networks. Therefore, the importance of communication is to avoid errors between the supervisor and the student (Ferreira & Pellegrini, 2019). Interpersonal communication can play an important role in the negotiation process during the supervision process (Geber, Baumann & Klimmt, 2019).

Thus, inaccessibility of information and services provided by DE supervisors, can contribute to low quality of students' success. The main responsibility of the institutions is to ensure that the facilities provided to supervisors are always appropriate for the supervision of students in a distance mode. The benefit of having good facilities is that it can be a factor in helping supervisors to reach their students with ease. There are circumstances where students and supervisors face personality clashes, barriers to communication, cultural and language difficulties or personal differences in working approaches. As an educational institution, all of these should be handled effectively to facilitate these students. In a thesis programme, there is a crucial need for an effective supervisory approach. Students may experience a lot of difficulties during their research process. Some of them may not be familiar with the research topic and some of them may lack the requisite knowledge of research methodology. On the other hand, supervision is one of the main elements that should be considered when discussing about graduate students. DE supervision has become very critical for graduate students to achieve higher degree certification. Supervision ought to be a central process for the successful completion of programmes. DE supervision needs to be interpreted as a two ways interactional process that requires both the student and the supervisor to consciously engage each other within the spirit of professionalism, respect, collegiality and open mindedness (Bueno, 2019).

Supervisors need to give prominence to existing competences and creativity, thus choosing skilled communication as well as authentic behaviours, so that they can help students through a manual to use as a reference point for the students as ways of supporting them. Distance supervisors ought to be involved in the theoretical and practical supervision of students through communication (Berney & Bourquin, 2019). The issue of who ought to initiate contact, the student or the supervisor is a concern. I would argue that maintaining effective communication is the responsibility of the supervisor, as part of both what the student is paying for and of the informal, if not explicit, learning contract between them. Establishing a formal contract, as an explicit strategy, is one possible way to solve supervision issues because a contract sets out the roles and responsibilities of both the supervisor and the student (Watts, 2008).

Challenges of supervising postgraduate students

By establishing distance learning and education programme, universities are now better positioned to attract part-time students, mainly working professionals,

and people with disabilities. The issue of flexibility is of a greater importance to supervision of postgraduate students in distance education because they are expected to be provided with the time and space to take up their studies alongside their demanding jobs and caring responsibilities (Nasiri & Mafakheri, 2015). Therefore, the challenges in distance postgraduate supervision originate from the spatial and temporal distance and disconnection between the supervisor and student. From a timing perspective, supervisor and student may live thousands of kilometres from each other, which may create an issue when finding a mutually convenient and productive time to connect (Ibid, 2015). It is highly likely that both supervisor and student may experience a lack of good personal knowledge about each other. This may drive the supervisory conversations towards a formal format and may make it harder to create an informal environment for discussions. This means that the encounters are in danger of being less motivating and less engaging, especially from the perspective of doctoral students that are in need of continuous technical and pastoral support for several years (Ibid, 2015). Lack of delicacy and depth in communications is yet another risk for distance supervisory discussions. Supervisors may experience an increased workload due to the expectation that they should be constantly open to requests from students and as they sometimes represent the whole university system for a distance student (Ibid, 2015).

Lee (2008) opines that supervisors may see themselves as being like the family doctor. They will provide some specific expertise but will also be a gatekeeper to many more learning resources, specialist opinions and networks. The supervisor can choose which gates to open, particularly in the early stages of the student's life. Within this understanding, therefore, there is also an understanding of the power of the supervisor in its widest sense. Not only is the student 'present' but also the supervisor is also 'present' as well. There is another aspect of the power dynamic may arise from the supervisor being gatekeeper to the qualification and the academic discipline: that of ownership (or even suppression) of the result. The student needs to be aware of how powerful (or not) their supervisor is in the institution, and discussion about enculturation as a concept or an expectation could help the student to make realistic decisions.

With the increased demand for higher education, some universities or departments may not have adequate staff at PhD level to supervise postgraduate students. This problem might result in the allocation of students to supervisors without adequate disciplinary background to advise the student, resulting in a potential challenge of having to offer supervision services in an unfamiliar academic terrain. Another challenge is that the supervisor may not have ground knowledge on the research area of focus and methodologies for appropriate data collection. Quality of postgraduate work may also be at risk when students are allocated to newly graduated PhD lecturers who need time to learn how to supervise. While they can learn through apprenticeship/tutelage of a more experienced supervisor, prepared guidelines may be useful in providing some tips and expectations for quality supervision (Kimani, 2014). In many of these cases, the challenge is that such supervisors are unable to guide the student to grasp the whole essence of the research focus and the entire optimal methodology to bring out the knowledge gap that the research is set to fill. Such is also possible with a supervisor who is not knowledgeable with the current theories and practices in the area of study. This has

serious implications for the quality of research output and the thesis. Evidently, such supervisors either delay the students 'completion schedule or just allow the student to submit a low-quality thesis/dissertation' (Kimani, 2014, p. 65). The relationship between a postgraduate supervisor and student is a crucial element in the successful completion of a PhD, in an era where timely completions have become a key focus. It is common to view the experience of postgraduate supervision in terms of conflict, isolation from others, trauma and 'fraught discipleship' (Hemer, 2012).

Lack of supervision skills

Supervisors need to be assessed whether they have information and the requisite skills critical to supervision at a distance. They ought to be trained in specific skills in distance supervision through a practical demonstration (Harvey & Schramski, 1984). **Change of Supervisors:** Difficulties in compatibility between the student and the supervisor may result with changes of supervisors in the middle of the research process. And the change may be more of a disruption rather than a benefit as a result of which the quality of the research report may be compromised. **Mode of supervision:** Co-supervision can be problematic because of diversity in views which can be confusing for the student. There may also be those supervisors who strive to gain a student's favour by discrediting other supervisors. The conflicts can get out of hand to the extent that the main or the principle supervisor is unable to control, unfortunately affecting not only the quality of supervision but also the students' rate of completion (Kimani, 2014). Among the challenges of postgraduate distance supervision students include engaging in the research culture of the university, dealing with isolation, self-regulating their learning, and effectively using onli1ne communication. While working with students, DE supervisors should maintain a system of communication and support throughout the research process, prepare students for research, writing, and new forms of communication, and be sensitive to students' life and work demands. These supervisors are expected to provide constructive feedback, opportunities and online spaces and technologies for communication, and maintain dialogue toward successful and reciprocally satisfying research processes (Kara & Can, 2019).

Ethical approval ought to be given for the study by the university's Ethics Committee (Davies, 2020). Time pressures are an acute element within the supervisory relationship, with the emphasis on timely completions for postgraduates and the workload pressures facing academics supervisors (Hemer, 2012).

Cardilini, Risely and Richardson (2021) believe that supervisors have the responsibility to give guidance and feedback on critical thinking, written communication, and relevant discipline knowledge to students. Students' expectations are that more guidance on developing their academic independence, their collaboration skills, and maintaining motivation should be provided by supervisors. Yet, some supervisors may think they have little or no responsibility in guiding students in qualitative attributes. Similarly, Sá, Santos and Serpa (2021) are of the view that 'the role played by the supervisor in monitoring the process of design, preparation and presentation of the end-of-programme project by students is undeniably important'. It is up to them to make sure that the student follows the timetable agreed upon at the beginning of the process, attains the objectives of the project and delivers a quality product, always in an iterative relationship with the

student. Therefore, supervisor's supervision activities must be characterised by flexibility, iteration, continuous feedback and constructive criticism, in the sense that the supervisor trains the student with investigative competences, in this teaching-learning process, although with specific characteristics.

Findings

The challenges faced by supervisors when supervising postgraduate students are lack of supervision skills, change of supervisors, and mode of supervision employed.

Conclusion

The challenges of postgraduate distance supervision for students include engaging in the research culture of the university, dealing with isolation, self-regulating their learning, and effectively using online communication. Supervisors should maintain a consistent system of communication and support throughout the supervision process.

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An Assessment of Teacher Performance in "Teach for Bulgaria" Based on Value-added from Test Scores

Abstract

The paper presents results from the evaluation of the Teach for Bulgaria (TFB) program, which is part of the Teach for All global network. TFB activities have relevance for a variety of fast-track pathways to the teaching profession. The evaluation is based on a quasi-experimental assessment of teacher performance through student value-added scores. Value added is estimated using the full datasets from successive standardized state examinations in Bulgaria after grades 4, 7 and 12. We found that TFB had most significant impact in mathematics and natural sciences which tends to be stronger in smaller schools and schools with disadvantaged students. The teacher recruitment system designed by TBF was also quite good in predicting teacher performance in mathematics and natural sciences but was not predictive of value added in humanities and language teaching.

Keywords: value added, program evaluation, teacher effectiveness

Context

The Teach for Bulgaria (TFB) program in Bulgaria started in 2010 with support from the America for Bulgaria Foundation, in order to adapt the Teach for All model and address the achievement gap among Bulgarian students.

Our analysis was conducted in 2018 but covers the first five years of TFB implementation from 2011 to 2015. In this evaluation, we use the value-added measure of student progress – from one point in time to another, based on comparable tests – to analyze the impact of the TFB program on student achievements.

The officially stated mission of TFB is "to provide every child in Bulgaria with equal access to quality education, regardless of their region, type of school, ethnic or socio-economic background" (America for Bulgaria Foundation, 2016, p. 5). TFB also declares its ambition "to raise the achievements of socio-economically disadvantaged, academically underperforming students by recruiting and selecting high-achieving graduates and highly-skilled professionals, training and supporting them to initially teach for two years in schools serving vulnerable communities and to become long-term leaders of change in our education system and society" (America for Bulgaria Foundation, 2016, p. 5).

To achieve its mission, TFB has launched a program which has adapted the Teach for All model to the Bulgarian context and has so far recruited, trained, placed and supported approximately 400 graduates and young-to-mid-career professionals in working for two years as full-time teachers in over 120 schools that predominantly serve underprivileged students. As of December 2018, over 260

participants (from 5 teaching cohorts) have already completed the program and obtained alumni status.

The Teach for All (TFA) model consists of 5 strands of interventions. The first two, which we believe represent the most distinctive feature of the program, focus on the recruitment of teachers from diverse backgrounds and their placement within schools in disadvantaged communities. The ambition of TFA is to "identify future leaders". It then provides teachers with support, which includes training and coaching. The goal is to foster classroom leadership and students' development. TFA partners in different countries, Bulgaria included, often use alternative pathways for recruitment, placement and training of teachers that differ significantly from the norms within each educational system.

Value-added models to assess teacher effectiveness

Value-added models to assess teacher productivity have become very popular in recent years – broadly used and vehemently criticized, mainly over the reliability of their basic assumptions (Sass, Semykina & Harris, 2014).

In the value-added models, the term "value added" refers to the measurement of progress between successive tests, which relies on regressing test scores on previous ones to derive expected scores and then look at the upward or downward deviation of a specific student's scores (the value added). Previous test scores appear in this model as a fixed effect; the plausible assumption is that they are correlated with subsequent test scores.

Additional independent variables of interest are included as fixed or random effects, either to measure contributing units of interest (usually teachers) on scores or to be used as controls, i.e., to calculate the coefficients of these units of interest, while also accounting the contribution of other random factors. Usually such controls are either stable or contemporaneous characteristics of students, teachers or elements of the environment – classes, schools, locations. It is assumed that previous test scores capture all previous (non-contemporaneous) factors affecting student performance: this is an assumption which is sometimes, albeit rarely, challenged (Todd & Wolpin, 2004). We base our model on this assumption, in line with most of existing research using value added. Information about previous characteristics of students and their family or school environment is very limited in availability.

Value added has been applied in the context of the Teach for All program. Value-added scores have been calculated in a variety of educational settings, including India (Azam & Kingdon, 2015), the UK (Slater, Davies & Burgess, 2012), Australia (Leigh, 2010) and Ecuador (Caridad Araujo et al., 2016), illustrating its applicability in the multiple contexts in which Teach for All operates. In Bulgaria, a similar value-added specification was used to assess the America for Bulgaria Foundation's School of the Future Program (Zahariev & Yordanov, 2016). Before that, the feasibility of applying value-added methods using Bulgarian national student assessment data was determined in an experiment piloted by the World Bank (Danchev et al., 2013).

Teacher effectiveness as measure by student value added

Teach for Bulgaria develops and implements procedures to identify future leaders, with diverse academic, professional and personal backgrounds, who will be placed as teachers for at least two years within schools in disadvantaged communities. The program deepens participants' understanding of the school system in Bulgaria and provides them with training to gain the skills and knowledge necessary to improve educational quality. Based on developed partnerships with the schools and other stakeholders, and aided by training and ongoing coaching, TFB teachers work in the selected schools and strive to foster classroom leadership and students' development.

The evaluation we carried out is quasi-experimental. Our assessment is based on a comparison between the achievements of students taught by a TFB teacher and their peers from comparable groups of schools built using propensity scores. A similar approach has been used, for example, by Chacón and Peña (2017), who also used a quasi-experimental design with difference-in-difference as a matching procedure to assess the impact of TFA's Mexican partner on students' socioemotional skills.

Considering the goals which TFB declares to pursue, namely closing gaps in education that arise from socio-economic disadvantage, it appears very logical to assess how the program has performed in terms of closing the gaps in test scores at state examinations. State examinations are the most visible sign of educational gaps, and they are increasingly being used in parallel by the Bulgarian government to guide state education policies and monitor their success or failure. In Bulgaria, state examinations in the form of standardized tests are administered after grades 4, 7 and 12. Standardized tests after grade 4 are relatively easy and have the purpose of guaranteeing that every student has covered an essential minimum requirement before proceeding to lower secondary education. Standardized tests after grade 7 are relatively difficult and are used in a process of competitive access to preferred schools and programs within upper secondary education. State examinations after grade 12 (matriculation exams) are required to obtain a diploma for secondary education and access higher education.

To assess the performance of each teacher, we have only considered examinations in fields related to the subject taught by the teacher. We have used a comparison group of teachers working in schools similar to the ones where TFB teachers were allocated. In this first period of implementation, the typical TFB school was similar to most typical Bulgarian schools. TFB teachers in the reference period taught up to about 5,000 students; the pool of students from which we sampled in the comparison group included about 200,000 students. We included schools in the comparison group based on propensity scores. The matching variables included school-level and territorial indicators related to the size of the school and the staff, the level of urbanization and the socio-economic development of the surrounding communities.

We have found evidence that the positive effects of TFB largely prevail. It shows that TFB teachers' students perform significantly better in the natural sciences and mathematics than in the social sciences and Bulgarian language and literature (BLL). All the effects we found in the natural sciences and mathematics were positive – some significantly so. This was the case for these subjects between

grades 7 and 12. A positive treatment effect also emerged in foreign languages between grades 7 and 12. Bearing in mind that teachers of disciplines such as mathematics, computer science and foreign languages tend to be in short supply in the Bulgarian educational system, we recommend that TFB continues to invest in recruiting and training such teachers and shares its experience with the Ministry of Education.

In the social sciences, we have identified one largely positive shift between grades 7 and 12, as well as one rather small negative effect which was unstable under repeated tests. For BLL between grades 4 and 7, one out of the pair of examinations showed negative value added; however, this is typical for such a school – so it could not be accounted for by the effect of TFB. Still, one of our main recommendations is to review the process of recruitment and training in the social sciences and Bulgarian language.

The positive effects in both the social sciences and natural sciences were even stronger in small schools with up to 420 students, indicating that TFB may work better in smaller and less urban communities – which also tend to be more disadvantaged in the Bulgarian context.

The TFB system of teacher assessment as a predictor of value added

As a recent overview of research on teacher selection puts it, "making decisions about selecting prospective teachers is, at its heart, making a prediction about future teacher effectiveness" (Klassen & Kim, 2019, p. 34). One of the main challenges in making the value-added analysis practically useful for schools, programs and the education system as a whole is to find good predictors of teacher performance as measured by value added. This is especially useful in the process of recruiting teachers. Knowing about performance after the fact is useful, but being able to select teachers who will deliver is much better. Of course, this does not necessarily mean that there are no better indicators of participant performance than school-level test results. We believe there are. So, the actual question we are asking here is: which teacher selection criteria are likely to increase value added? Whether to prioritize such criteria is a decision which schools, programs or educational authorities need to make.

The fact that observed teacher characteristics usually do not help much in predicting teacher productivity is a common challenge in the measurement of value added (McCaffrey et al., 2009; Azam & Kingdon, 2015). Studies that find any link between observable teacher characteristics and student performance tend to emphasize characteristics, such as teaching experience (Leigh, 2010), which cannot be reproduced in the framework of the TFB program or most programs seeking alternative pathways to teaching careers.

During the evaluated period of the program, the set of selection criteria for TFB teachers included a combination of personal characteristics such as: leadership potential and experience, academic achievements, ability to influence and motivate, organization and planning skills, attitudes towards communities, analytical thinking and perseverance.

To get some idea of the predictive power of value-added scores, we just checked for their linear correlation with the TFB system of internal teacher assessment used in the process of recruitment, training and assignment. The TFB system evolved

with the program's deployment. We have used data from an early version of the system which was used during the period covered by the current evaluation: 2010-2015. The most important indicator in the system is the overall score, which is meant to provide a weighted summary of general teacher effectiveness.

The overall score used by TFB is an especially good predictor of value added in mathematics. This predictor works best for upper secondary education, explaining 80% of variations in value-added scores in mathematics between 2010 (grade 7) and 2015 (grade 12).

In general, the scoring system used by TFB would select more teachers that are likely to demonstrate higher value added in mathematics. At the same time, the TFB scoring system selects teachers that are likely to perform worse in terms of value added in the social sciences and Bulgarian language and literature.

We do not assume that value added is the best ultimate assessment of teacher performance. Other measures of performance, like the TFB system for teacher assessment, can do a better job according to concrete tasks. We have merely tried to find out whether it is possible to predict via other prior assessment tools the value added by teachers when value added is considered important. In many cases, this is true for various stakeholders like school management, educational authorities, parents and students, among others.

Conclusion

The most notable conclusion is that TFB teachers are far more likely to have a positive effect in mathematics and the natural sciences than in the social sciences, reading and writing. Teach for America teachers do as well or better than comparison teachers at raising student achievement in math and science, and show no differences in reading (Chiang, Clark & McConnell, 2017).

The nature of BLL and humanities training presupposes a longer period of pedagogical interaction to achieve learning outcomes – especially when teaching is offered to students with a lower level of linguistic skills in the official language. Bulgarian language knowledge is a key prerequisite and a basis for the understanding of humanities-related subjects. Language is learned mainly through a gradual process of building experience, including through the child's own social experience. This social experience may be quite limited for children from vulnerable groups, and minority children do predominantly learn through their mother tongue.

Our results show much higher retention rates for students of TFB teachers. One possible interpretation of the increased retention of students is that TFB teachers may have increased the interest of students towards learning and the motivation to stay at school, even when their work did not have a direct cognitive impact measurable by standardized tests.

The typical TFB teacher is younger than the average mainstream teacher, has demonstrated high academic achievement and is able to pass a difficult selection procedure which puts both cognitive and non-cognitive skills to the test. However, they probably would need more in-depth training to understand the needs of the groups of students they work with and to create a "common language" with them. Teachers need time to translate "high" science into a pedagogy of knowledge for middle and lower level students applying student-friendly and sensitive teaching.

Presumably, most of the TFB teachers at the beginning of their work have only theoretical knowledge about children from vulnerable communities, and their social experience is quite different from that of their students. The deepening social divisions over the last three decades have undoubtedly influenced the mutual knowledge and ability to communicate effectively between students from vulnerable communities and those who are supposed to work with them. Therefore, part of the intervention time, which usually lasts for 1-2 years, is necessary to create a positive teacher-student relationship and, in this period of mutual adaptation, the effect on educational outcomes is more limited. The adjustment time needed for teaching Bulgarian language and the humanities could be even longer than for mathematics.

TFB teachers, almost without exception, either lack previous teaching experience or their pedagogical practice is too limited. In BLL and the humanities, they often need to experiment with different classroom approaches, and there is far greater diversity in these approaches than there is in mathematical teaching methods. Young teachers have to apply the principle of trial and error in the weeks and months to come and over and over again. And, in this respect, more experienced teachers have one more advantage – they have already gone down that path.

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The Impact of National Independence and Globalization on the Status of English Language Instruction within Uzbekistan

Abstract

Uzbekistan is a multinational country where the Uzbek language remains the only official language within the country. While historically the Russian language has served the function of a *lingua franca* for ethnic minorities, and was often viewed as a second "mother tongue" within Uzbekistan, its status appears to be declining with assent of the English language since independence in 1991. Clearly, the English language has been viewed as a more desirable alternative to the more repressive Russian language, and was viewed as a basic opportunity to obtain an internationally based education. It is often seen as the route to better employment within a competitive global marketplace. The importance of English language instruction was underscored by the first President of Uzbekistan, Islam Karimov, and the role of English was also emphasized in both education and the media. The emphasis on continuous English language training was also included in the presidential decree. Today, English language instruction begins in the 1st grade, rather than in the 5th grade of primary school. However, with this emphasis on continuous English language instruction, have teacher education programs in Uzbekistan kept pace? Has there been financial support for the development of quality English language instruction throughout Uzbekistan's schools? Moreover, has this emphasis on quality English language instruction been universal across all populations within Uzbekistan? These issues will be examined in detail within the paper.

Keywords: English language instruction, global marketplace, teacher preparation, Uzbekistan

Introduction

Since the Republic of Uzbekistan's *Declaration of Independence* in 1991, it has begun to establish close relationships with other countries worldwide in various fields, with the role of language remaining a priority. Nevertheless, while the Uzbek language was officially declared the national language of Uzbekistan on 21 October 1989, the Russian language remained the *lingua franca* in the early 1990s, as it continued to be used in official documents and within many facets of urban communication. English, however, has now become the preferred language at this stage of development within Uzbekistan, and its use has helped to establish the country's international linkages. Of course, over time, the government has continued to make several changes in language policy according to national development plans.

The English language, its role and challenges in 1990s

Referring to the official linguistic policy of the Karimov government, Uzbek is the official language, and Russian is the second language (National Database of

Legislation of the Republic of Uzbekistan, 2012). Residents of Uzbekistan are required to study Uzbek to be eligible for citizenship, with similar additional language adaptations as those taken in Azerbaijan and Turkmenistan. In September 1993 Uzbekistan changed its alphabet from Cyrillic, which had been in use for more than fifty years, to a script based on a modified Latin alphabet similar to that used in Turkey. According to government plans the transition should have been completed by the year 2000. The primary reason for the urgent need was to communicate with the outside world using a more universally understood alphabet. Moreover, a major project was underway to eradicate Russian words from the language and to replace these words with "pure" Turkic words that were borrowed from what is believed to be the ancient Turkic language of Inner Asia. At the same time, Uzbekistan's linguistic policies were moving toward the West and this helped to attract foreign investors from various business spheres (Federal Research Division of the Library of Congress, 1996). In the early 1990s, studying English became increasingly common, but at the same time, there were some difficulties, such as few English resources for learners. Moreover, many English language textbooks were in Russian due to the influence of the former Soviet Union. In late 1990s, the Ministry of Education adopted the *Standards of State Education,* which were called the Uzbek model, and paid more attention to foreign languages other than Russian. Study-hours devoted to the Russian language were also reduced at Uzbek schools as English became more popular among learners. Rod Bolitho (Hasanova, 2007), a language specialist, has observed that a strong interest in the English language was caused by two factors: the intention of studying and working abroad, and the idealisation of the UK and US. These are the two strongest motivations for the Uzbek people to learn English. Hasanova (2007) posted that the continuously increasing interest in learning English is due to the international significance of the language.

Today, Uzbekistan has been actively developing cooperative linkages with international organizations such as the Future Leaders Exchange Program (FLEX), the former American Council for Collaboration in Education and Language Study (ACCELS), the International Research & Exchanges Board (IREX), the Consortium of American Colleges, the Peace Corps, Deutscher Akademischer Austauschdienst (DAAD), the Conrad Adenauer Fund, the British Council, the Saud Al-Baltin Fund, and other nongovernmental organizations.

On 10 December 2012, Decree #1875 *On Measures to Further Improve Foreign Language Learning Systems* was adopted (National Database of Legislation of the Republic of Uzbekistan, 2012). The decree emphasized language proficiency improvement in the sphere of education. Due to this decree, the Ministry of Public Education and the Ministry of Higher Education adopted the Common European Framework of Reference for Languages (CEFR) standard and developed the National Retraining Program for foreign teachers. This program was focused on a comprehensive foreign language teaching system, and aimed at creating harmoniously developed, highly educated, and a modern-thinking young generation capable of integrating the country within a globalized community. Formerly, many English teachers had simply utilized grammar based approaches in secondary schools.

The implementation of the CEFR standard began gradually with the spread of foreign languages, especially English, throughout the country, beginning with

primary schools, secondary schools, and higher educational institutions. It was also envisaged that university modules, especially in technical and international areas, were to be offered in English and other foreign languages. In order to increase English language proficiency in distant rural areas, higher education institutions started a special program to increase the involvement of English teachers in rural areas where schools did not have a sufficient number of English teachers. In that case, applicants who are from rural areas had a special admission opportunity to study at universities, though they were then obliged to work in the acquired specialty within their area of residence for at least five years after graduation. Since the enforcement of the decree, all English language teachers have a chance to receive a monthly salary bonus of 15% for urban areas and 30% for rural areas. The aim of this policy was to encourage teachers to upgrade their language proficiency which, in essence, is the principal obligation of a language teacher.

As a result, this policy has shown a positive impact on the quality of education staff, and has become the main criterion of employment in the country, not only in education but in other spheres as well. This approach helped the Uzbek to understand what language level must be acquired to meet an employer's demand. In addition, after adopting Decree #1875, highly skilled English teachers were prepared to become regional teacher trainers to requalify regional English teachers through in-service institutions to enhance their teaching skills and techniques. This also prepared teachers for tests, which were developed and conducted by the National Testing Center. Moreover, to assist teachers and to obtain the English Proficiency Certificate B2, payment for training courses and preparation was fully covered by the government. Moreover, from 2014 to 2017, the Ministry of Public Education cooperated with the British Council and held an exchange program to motivate English teachers. About 50 teachers from different areas participated in this exchange program, which was held at various secondary schools in the United Kingdom.

Reforms and new approaches

In 2016, Sh. Mirziyoyev was elected as President of Uzbekistan, and signed a decree *The Development Strategy of Uzbekistan* (The Tashkent Times, 2017). The document contains Uzbekistan's Five-Area Development Strategy for 2017-2021, which was followed by a public discussion regarding a comprehensive study of topical issues, analysis of the current legislation, law enforcement practices, and best international practices. The decree created a National Commission responsible for implementation of the development strategy, which is headed by the President and other governmental members. In order to implement the strategy, several reforms have been made in the sphere of Education. In 2017, the Cabinet of Ministers adopted a decree. It stated that science teachers who have received the International English Language Testing System (IELTS) from British Council or a Certificate of language proficiency from the National Testing Center, as well as other certificates that indicate an approved level of English language proficiency, will be able to obtain a salary bonus of 100%. Moreover, applicants who have the above mentioned certificates will have an opportunity to obtain pass marks for English exams given by national universities or institutes.

Moreover, the Ministry of Public Education established close relationship with the Swedish company "Education First (EF)" which intends to implement the English language usage in Uzbekistan by investing about US $60 million in joint project and its priority tasks will be carried out by the Innovation, Technology and Strategy Center. The parties have planned to cooperate in order to assess the knowledge of students and teachers. The project conducts free testing of English teachers throughout Uzbekistan and determines their level of knowledge which includes exchange programs in European and American Universities. They have also planned to conduct a series of training courses to increase knowledge and skills related to the development of the English language in Uzbekistan (Ministry of Public Education, 2019).

In addition, another project was launched in 2019 by the Ministry of Public Education and the English Speaking Nation (ESN), which is still in process, with the objective of developing the English language skills of secondary school teachers in Uzbekistan (American Councils for International Education English Speaking Nation Program, 2020). The Innovation, Technology and Strategy Center has been selected to implement this project, which works together with stakeholders such as the American Council, the Research Triangle Institute (RTI), and the United States Agency for International Development (USAID). The project focuses on helping secondary school English teachers identify their level of English, and then supporting teachers as they upgrade their language proficiency. It assists teachers in improving their student-centered pedagogical skills, facilitates capacity building of trainers and mentors, encourages Continuous Professional Development, revises English language teaching standards, curriculum and training materials, and assists with the design and development of assessment capacity systems.

This four-year project includes about 33,000 English teachers who will benefit from direct and indirect participation in training and professional development activities, which subsequently will lead to improved English language competencies for six million school children. The project will also strengthen the positive perception of Uzbekistan secondary school English teachers, as exemplified by the English Speaking Nation: Secondary Teacher Training (ESN:STT) program, a joint project of the Ministry of Public Education and the Public Affairs Section of the US Embassy. This program is implemented by the American Council for International Education and offers an integrated professional development opportunity for English language teacher trainers and secondary school English language teachers in Uzbekistan. Moreover, ESN:STT improves students' English language skills and knowledge by preparing more than 15,000 secondary school English teachers and over 1,000 teacher trainers to use teaching and in-service training practices that improve student language learning. Programs include a cascading model that involves training of trainers, professional development activities for secondary school English teachers, and a mentoring program to build peer support among educators. The best 300 Regional Peer Mentor-Teachers will be invited to be trained by ESN:STT Master Trainers, and will have the opportunity to earn the TESOL Core Certificate. As a culminating event, the Core Trainers and Regional Peer Mentor-Teachers will have the opportunity to participate in the regional TESOL conference to be held in Uzbekistan in 2022. However, due to the current pandemic, the period of this project has been extended.

During this quarantine period, the Ministry of Public Education, various government establishments, and other organizations continue to work together through the leading online educational platform, Coursera. For example, they launched a significant program for those who were currently out of work, with all expenses covered by the government. In the author's opinion, Coursera is a global online educational platform with many fine instructors from some of the best universities and companies in the world. Through this program, participants receive a free education of the highest quality. Upon completing this course, as well as additional programs, participants are also awarded special prizes from the Ministry of Public Education.

Conclusion

In conclusion, there has been a great deal of change within various educational fields, and the government has established a priority with regard to the necessity of learning English within multiple spheres. This vision will not only assist in the advancement and development of Uzbekistan, but will also enhance the country's role as a major and influential participant in a globalized world.

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The Cultural Impact of Music on Society with a Special Emphasis on Consumerism

Abstract

Today's society, defined as the consumer society, marks an intertwining of many different cultures influencing the entire population, mostly the young. Cultural studies explore all aspects of culture, including music, and their ultimate goal is to understand the changes occurring within the framework of contemporary culture. Music has its own cultural value and makes a major impact on consumer behavior, creating and shaping the interests, motivations, and desires. Nowadays, consumerism is the dominant form of a consumer society, and it was proven that music is used in a targeted way to increase consumption. In this paper, will attempt to point out the importance of educating young people about quality music and its benefits for the formation of their musical taste.

Keywords: music, culture, consumerism, cultural studies, teaching music

Introduction

Music is ever-present in the daily life of each individual making it is almost impossible to imagine life without it. Studies show a wide range of situations in which people listen to music: while learning, running, exercising, driving, when getting up and going to sleep, during working hours, etc. Music is a social phenomenon that is present everywhere and, as the medium by which we shape our environment, it makes a great impact on society. People use music as a symbol and a label of their own values, attitudes, and self-perceptions influenced by psychological functions of music such as expressing emotions, aesthetic enjoyment, entertainment, communication, physiological response to music, and symbolic representation (Hargreaves & North, 1997).

Choosing music for listening during the day creates a picture of our musical preferences that describe the extent to which we like a particular type of music. Many studies on musical preferences have shown the importance of knowing what kind of music people like and why, as this contributes to understanding the attributes that signify their belonging to certain social groups. In everyday interactions, people use implicit theories related to musical preferences that help them make judgments and shape impressions about the people they come in contact with. In this way, music itself influences adaptation to a particular situation and therefore has a direct impact on human behavior and on society as a whole.

About cultural studies

The beginning of the 20th century sees the domination of the contemporary media – newspapers, film, radio, and television, which separate high (elite) and popular cultures (Duda, 2002). A modern, consumer society based on mass

communication has imposed new obligations on culture. The demand of the public and users is increasingly moving towards a kind of combination of art and entertainment, towards the entertainment industry of the mass media, in which art has also been integrated.

Cultural studies emerged as a reaction to British positivist sociology and social circumstances (the emergence of popular, mass, global, consumerist culture, the society of the spectacle) and due to the lack of readiness of the then disciplines to deal with new problems. David Beard and Kenneth Gloag define cultural studies as "a generalization that encompasses all aspects of researching culture, including music" (Beard & Gloag, 2005, p. 45). Many theories that have so far been classified under cultural studies are extremely stimulating for rethinking social phenomena in a new way (Bezinović, 2004). Foucault criticizes the ruling discourse because he believes that it is necessary to deconstruct the existing knowledge to arrive at the basic assumptions on which there lies what we think we know. He believes a social intellectual should be redefined and able to reexamine not only other people's systems of thought but also her/his own ideas and attitudes. Cultural studies do not have a single discourse or a single study methodology making it very difficult to give a uniform definition that would cover a wide area of cultural studies practice (Foucault, 1994). A very important aspect of cultural studies is that they are often understood as an interdisciplinary field that explores culture, and are most often associated with popular culture and popular music. A permanent determinant of cultural studies is the effort to establish an active relationship with the times in which we live, i.e. the pursuit of the contemporary (Duda, 2002), and their ultimate intention is to understand the changes that occur within contemporary culture as a projection of the opposing models of representation and diverse lifestyles and the opposing communication strategies.

The cultural value of music

Observing music in today's society is inevitable if wanting to describe that society because music is a medium through which people form and express their identity and as such plays a major role in society as a central part of the social system. Music is a symbol of connecting people and their values based on shared experiences. It is an important component of society as a means by which certain groups of people define themselves and their relationship to the rest of the world (Frith, 1987).

Popular and art music represent two different musical cultures. Moreover, popular music is associated with the concept of subculture. Music serves to fundamentally establish the identity of certain subcultural groups since a particular form of popular music can be chosen as one of the elements in a series of core values with which a subcultural group identifies itself (Edgar & Sedgwick, 1999). Popular music certainly plays an important role in the development of popular culture and art and it found a wide application due to the new media, yet listening to music did not thereby gain a new value. With the advent of mass media and the increasingly diversified entertainment industry, mass culture is being created over time, and music loses its ideological background and meaning becoming just another in a series of commodity products of the entertainment industry that strive to unification, thus erasing the differences among different styles of music.

Nevertheless, popular music, as a foundation for the development of many music directions and styles, has become a medium which communicates and creates new cultural meanings and symbols (Krnić, 2006).

Art music occupies very little space in radio and television programs, which is probably one of the reasons for the absence of a critical attitude of young adults towards low-quality music and their being prone to media manipulation. Dobrota and Tomić-Ferić in their research on the sociocultural aspects of musical preferences start from the premise that the entire music, including art music, is a social construct, and it is therefore necessary to observe it from both social and cultural aspect. It is not reasonable to require the young to listen to exclusively art music, yet from the standpoint of music pedagogy, during education it is necessary to appeal for the familiarization of the young with valuable musical pieces which will help them develop their musical tastes. Only in this way it is possible to educate them as cultivated listeners with developed criteria for evaluating any music type and style (Dobrota & Tomić-Ferić, 2006).

The carriers of new cultural aspirations, inseparable from music, form a diffuse group from different civic strata and age groups in which young people still dominate and through music express intolerance towards the conventional civic way of life. What determines the culture of the young is a common experience that creates a common problem, but also finds common solutions (Juvančić, 1997).

The influence of music on consumerism

One of the main characteristics of today's society is consumerism, and consumption as a way of life is a symbol of success. Nowadays, consumerism has become the center of social life, consumption being the central preoccupation of culture. The most important principle of consumerism is found in an economic ideology that encourages and advocates the permanent acquisition of goods and services to the greatest extent possible (Boga, 2016).

Today, the function of music is much more than pure entertainment, because music, due to its far-reaching distribution possibilities, determines the sound environment and as such has a significant impact on an individual's psyche, behavior and way of thinking. Music in multimedia is a reliable and tested instrument which in many ways influences the perception. Its effects must be carefully considered because music creates emotions, attracts attention, conveys both implicit and explicit messages, and helps people keep information (Zander, 2006). It has been proven that music has a direct impact on consumerism, i.e. on the behavior of consumers when buying. Many studies have shown that musical preferences vary depending on age, and responses to music generally differ in terms of gender as well. Women prefer slower and quieter music, while men prefer faster and louder music, regardless of genre (Peretti & Swenson, 1974). A survey conducted by Yalch and Spangenberg found that customers made more unplanned purchases while music was playing in the background as opposed to when music was in the foreground. Genres such as classical music and jazz are generally considered more complex and valuable than popular music genres. Consumer response to a particular piece of music often depends on individual musical knowledge or personal memories that a particular song can generate (Yalch & Spangenberg, 2000).

Music has a cognitive reality related to the subjectivity of the listener's perception. Consumers within the service environment may show a tendency for familiar music they heard before. It has been shown that background and silent music have a greater impact on consumerism, making people slowly move in the markets following the slow music tempo, and quieter music creates a pleasant atmosphere which keeps people linger in the store and makes them spend more. Consumerism is the dominant pattern of consumer society, and culture has a great influence on consumer behavior because it creates and shapes interests, motives, and desires.

Conclusion

Music has become very popular and is available to everyone, thus young adults mostly develop their musical taste under the influence of media, which broadcast music of questionable quality. The omnipresence of music certainly has a positive effect on society, yet it inevitably has a negative one as well, due to the harmful impact of low-quality music broadcasted by the mass media. In preventing the consequences of such negative influences, a major role is played by the sociocultural and educational systems that ensure that music becomes a true cultural need of every listener (Dobrota, 2008). Popular music should be more represented in teaching as this in line with the goals of teaching music, and at the same time it is filling in the free time of young people. Therefore, the representation of popular music in teaching is very important because of the interdisciplinary approach that is certainly more interesting to students, moreover, the knowledge gained in this way is more lasting and of higher quality and this is the best way to teach the basic music significances (Dobrota, 2008). Popular music reaches a maximal level of liking much faster, mainly due to attractive lyrics, arrangements, and melodies, but after a short time it becomes uninteresting. Art music, on the other hand, is generally rejected during the first listening, but by cultivating active listening it is more comprehensively perceived and understood, which increases preferences for this type of music (Dobrota & Tomić-Ferić, 2006).

Today, music influences consumerism greatly, which mainly means the growth of attractiveness and consumption of goods and services. People generally associate purchasing with happiness and set their consumer targets in life according to the surrounding offers. These offers are greatly influenced by advertising in which music plays a significant role, as well as its presence in all service environments. I think that from the presented cultural studies on the different cultural aspects of music we can draw useful conclusions to be implemented in classes and gradually work on continuous education of young people about the importance of recognizing quality music and its impact both on individuals and the whole society.

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Policies and Strategies to Improve Education in Bangladesh

Abstract

Education in Bangladesh is one of the basic requirements for everyone considering the idea that the country has a high number of uneducated individuals. The research herein focuses on examining and analysing the strategies and policies that Bangladesh uses to ensure it enhances the education in the country's schools. The theory adopted is the accountability theory, to show how the government of Bangladesh is trying to take measures to improve education. A thorough literature review explains what happens, which in turn justifies the policies and strategies presented there. A brief conclusion and recommendations follow.

Keywords: education in Bangladesh, policies and strategies, improvement of the education system

Introduction

Education is one of the most important aspects in the lives of the people of Bangladesh as they try to incorporate themselves into the larger world. The history of education in Bangladesh dates back many years, with public and private schools being dominant in the history books. Despite the need for education for most of the Bangladeshi people, the fact remains that the education system in the nation is not competitive when compared to those systems existing at international level. Bangladesh lacks a unified curriculum for teachers to use when instructing their students. Similarly, the country has a limited number of highly skilled instructors to enhance and make a difference in the education sector of the nation. It is important to note that Bangladesh also constitutes a population that largely relies on public schools, which in most cases are flooded with students and not all of them meet the standards portrayed by the nation's private schools. However, policies and strategies can be put in place to ensure that there is an improvement in the educational performance in Bangladesh. The government has a significant role to play in ensuring that this improvement occurs. The government can work on changing the attitude towards education, raising its aspirations for education, and establishing the government's intent on improving educational provision. Therefore, examining the role the Bangladeshi government intends to play in terms of formulating policies and employing improved strategies to ensure that the level of education in the country improves, is vital for the people of Bangladesh.

Rationale for the research

The purpose of conducting this research was to ensure that a clear understanding of the policies and strategies that can help improve education in Bangladesh is established. The justification for seeking improvement in education in Bangladesh is that most of the schools do not perform well and that is attributable to many factors,

but includes the poor standards of education offered to most students. Hence, to ensure that the country produces graduates who are market-ready and relevant, better strategies and policies need to be employed for schools to be improved. Many strategies and policies used globally can be applied to the task of improving education in Bangladesh. However, it is vital to only consider those that can be applied within the environment of Bangladesh. This forms another rationale for the carrying out this study. The study will reveal why and how the strategies and policies required can be implemented to ensure that education in Bangladesh improves significantly.

Research questions

The research questions below were the guiding principles for conducting the research in question.

- What are Bangladeshi government's aspirations for education?
- What strategies has the Bangladeshi government put in place to ensure that it improves education?
- What policies does the government of Bangladesh use to ensure that the improvement of education is achieved?
- What does the Bangladeshi government intend to do to improve the education system?

The research questions were ideal in guiding the research because of the clear sense of direction they provided.

Research design

The integration of the different components of research using one strategy constitutes the research design (Jones, Baird & Lunin, 2018). This study adopted a mixed method research design because of its flexibility in terms of the amount of information to be gathered. The mixed method research approach utilizes many strategies of collecting data (Rahman, Ationg & Zulhaimi, 2017).

Methodology

The study mainly focused on obtaining qualitative data, since the topic of study is one that many scholars in the past have participated in when trying to be part of the solutions of Bangladesh education's problems. The methodology of a study constitutes the means by which a researcher obtains information that is essential in finding solutions and recommendations for further action in order to achieve change (Leatherdale, 2019). A literature review of previous work related to the improvement of education in Bangladesh was conducted. The essence of the literature search is to gather information about the topic under discussion, using and collating information from previous scholars who undertook research in the same field or topic.

Data collection

The data collection methods that one chooses to work with in a study are vital in influencing the amount and kind of information they gather (Ivey, 2017). There are

two major methods of collecting data, which are from primary and secondary sources. The primary data sources constitute those that provide first-hand data, whereas the secondary sources provide information that has been previously researched and compiled in a book, report or article (Dickinson et al., 2004). This study utilized the secondary sources and they constituted a search of information from peer-reviewed articles. Peer-reviewed articles are reliable because they contain information that previous scholars have researched and have established as a result reliable findings and conclusions (Bluemke & Sosna, 2020).

Data analysis

The data obtained from the secondary sources was analyzed by examining the findings of the literature review, looking for similarities and differences and providing an overall summary

Theoretical framework

The theoretical framework for this study was based on the accountability theory. This theory states that a person can be accountable by justifying their behavior towards other people (Bergsteiner, 2012). In this case, the government of Bangladesh can be seen to be accountable because of venturing into projects that were intended to help to improve the quality of education. The government is accountable to the electors and are expected to demonstrate the same. Therefore, the accountability theory is a useful tool in this study, as the government has also a duty towards the country's students.

Literature review

The government of Bangladesh is working hard to ensure that the schools in the country improve the level of education they offer to the students. According to the World Bank Report, the Bangladeshi government has collaborated with the World Bank to invest in the education sector. As a result, the over one million children who are out of school currently, will benefit (The World Bank, 2018). The collaboration will also concentrate on developing a stronger and better curriculum that will allow teachers and students to display their best in teaching and learning respectively. The government's effort to seek support from the World Bank is a great move for the Bangladeshi education sector, because a proper curriculum is one of the aspects that the nation needs to improve the level of education therein. Therefore, such a strategy of collaborating with global organizations can prove to be beneficial to the Bangladeshi education system now as well as in the future. Such organizations provide the financial muscle that the Bangladeshi government requires in transforming its education sector.

The Bangladeshi government is working hard to establish policies that will help in the improvement of the level of education in the country. According to Austin et al. (2008), the government of Bangladesh is endeavouring to recruit more tutors in schools that have many of the least literate students. The essence of employing more tutors, is to ensure that these students do not lack human personnel to attend to them. Having more tutors means that students will be able to be open to the tutors regarding their weaknesses and find the help they very much need. The government,

therefore, takes the responsibility of funding such moves to ensure that the students in Bangladesh are attended to in the best way possible. Consequently, the presence of more tutors, increases the chances of the students prospering academically.

Similarly, the Bangladeshi government has adopted the former centralization strategy in managing matters pertaining to education. According to Austin et al. (2008), the government has encouraged the process of decentralizing education matters, such that national and district officials work together with the committees that manage schools, to ensure the disbursement of block grants. The presence of grants is important in that they help schools acquire more resources that they may need to make students' learning environment more conducive. Many schools in Bangladesh, especially the public learning institutions, underperform partly because of the insufficiency of resources. Certain resources such as classrooms and reading material are essential in ensuring that students perform well and that the level of education improves. Hence, when the Bangladeshi government decided to adopt the decentralization strategies when managing education matters, it aimed at improving the standards and level of education that is offered in the schools of that country.

The number of illiterate people in Bangladesh is worryingly high because of the low rate of school attendance. Malak (2013) conducted a study on the Bangladeshi government's Primary Education Development Program (PEDP) established to enhance education in the country. The significance of the program was to ensure that as many children as possible join schools to study. Better attendance of students in school, is one way of improving education thereby justifying the government's investment of funds in the PEDP program.

The Teaching Quality Improvement in Secondary Education Program (TQI-SEP) is pivotal in explaining the role that the Bangladeshi government is playing in ensuring that the education levels are enhanced in schools. The TQI-SEP is important in enhancing education, because it concentrates on improving the quality of teaching. Enhancing the teaching quality constitutes many activities, including making sure that teachers' colleges are sufficiently equipped and making available to teachers the necessary resources needed for instructors to deliver good lessons. The most important point to note is that the Bangladeshi government commits its resources to formulating these policies and employing different policies therein to ensure that education in Bangladeshi schools improves significantly. The improvement in the quality of teaching means that students will be able to acquire knowledge from instructors, who themselves have a comprehensive understanding of the concepts of their subject. The teachers will also be well positioned to deliver content because of the training they have undergone, before they are afforded the opportunity to instruct. Hence, the PEDP and TQI-SEP programs play a significant role in ensuring that education in Bangladesh is largely improving.

According to Khondaker et al. (2019), the modernization of curricular is one of the most important strategies that the government of Bangladesh uses to enhance education. Most of the schools in Bangladesh utilize an outdated curriculum in comparison to what other countries use. This means that the knowledge that students acquire is not to the level that the rest of the world enjoys. The government of Bangladesh has played a big role in putting in place the resources that enable the establishment of a modernized curriculum in most of the schools. The essence of establishing modernized curricular in Bangladeshi schools, is that this helps in

ensuring that the students adapt to the changes that are happening in the world. This means that the students from Bangladeshi schools can be at par with rest of the world in contributing to the country's development. Improving education from a perspective of using a modernized curriculum means that the contents of the curriculum are designed to suit the challenges that prevail in the contemporary world.

It is important to note that with the emergence of new job opportunities, the government's educational aspirations keep changing because the economic value of education needs to be increased to meet the demands in the job market. According to GAGE (2019), the government of Bangladesh has invested in girls-only stipends to ensure that the girls' schools perform better, thereby improving the education of females in the country. The essence of concentrating on the girls, was to ensure that the large numbers of young girls who do not have access to schools because of a variety of avoidable circumstances, can find the time and opportunity to go to school. This strategy improves the education in Bangladesh in the sense that the girls, are motivated to go to school and study hard because of the stipends. In other words, the stipends act as motivational factors for students to perform better and cause an improvement in education. It is vital to note that the quality of education improves whenever the students are willing to learn, since this gives their instructors a great incentive to encourage good standards of wok.

The above-discussed issues constitute the challenges that the education system in Bangladesh faces. It is crucial to note that one of the greatest problems the education system and the government of Bangladesh is corruption. According to Prodhan (2016), the government of Bangladesh is working hard to eliminate corruption and pave the way for the allocation of more funds for the most important necessities in the education sector. The Bangladeshi government is trying to decentralize education-related activities to ensure it eliminates the rigidity that is present in the administration of services. This will lead to improvement in policy formulation processes.

Through teaming up with private organizations, the government of Bangladesh is offering grants to students and charging very low amounts of interest rates. The grants are meant to facilitate the education of bright students in higher education, for example in the universities. The essence of using grants for students is to ensure that the government becomes part of the efforts in improving more attendance in higher education, by facilitating students' ability to attend university. Education is improved when students are offered grants because they help students to acquire adequate learning materials, which they would have otherwise not been able to afford. Consequently, when students have enough learning materials and a good learning environment, it becomes possible that with time, better results will occur. Most of the grants given to the students have long years of repayment, thereby making it comfortable for students to repay once they are employed.

Therefore, the Bangladeshi government's efforts have, in the recent past been bearing fruits because a slight improvement in the level of education has occurred in students' performance.

Educational infrastructure is important in ensuring that students and instructors can display their best in both Bangladesh and many other nations. According to Meje (2012), the Bangladeshi government is working hard to ensure the

improvement in the infrastructure of the schools within the rural areas. This includes classrooms, student dormitories, and laboratories. Such infrastructure is important in the development of the education sector. The essence of investing in educational infrastructure is that it aids in improving the learning environment of students. Classrooms are the biggest problem for most of the schools in Bangladesh and as such, the government's efforts to improve educational infrastructure is vital, resulting in the construction of new teaching areas. With the government supporting the development of educational infrastructure, it remains to be seen how the students and teachers in Bangladeshi schools will do their part to ensure there is a further improvement in education in the country. It is important to note that most of the schools that the Bangladeshi government concentrates on, constitute the public learning institutions. Most of the private schools have better infrastructure to support student learning and good instruction from the part of teachers.

According to Anonymous (2020), working hard to enforce the legislation for compulsory primary education from 1990, which requires that primary education, be made mandatory is essential. Enforcing this policy brings about an increased level of literacy. Making it mandatory for all children to attend school enhances education in the whole nation. With most of the population in Bangladesh, the government is taking bold steps that at present may not be visible to the public. These actions will benefit the education sector of Bangladesh in the near future. Hence, utilizing the opportunities available to formulate or enforce policies, is essential in helping the Bangladeshi government make education in the country better than it is currently. Other policies that the government of Bangladesh is strongly enforcing include the Non-Formal Education Policy (2006) and many others. It is important to note that the country still has a long way to go in formulating policies that will help students and teachers raise achievement in academic work. There is need to formulate and enforce many more policies based on the challenges that the schools of Bangladesh are facing every day.

Conclusion

The improvement of education in Bangladesh largely relies on the policies and strategies that the government puts in place. The Bangladeshi government is playing a significant role in ensuring that better policies are formulated to guarantee the improvement of education. Similarly, better strategies are being used to enhance the level of education in the country, in particular the increase in funding for education. Based on the literature review, it is evident that the Bangladeshi government is aiming to ensure that it introduces policies and strategies that will enhance the lives of teachers and students, thereby improving education. However, further data gathering will aid in analyzing the situation regarding the efforts of the Bangladeshi government to improve education.

Recommendations

It is to be applauded that the government of Bangladesh invests in the policy-making processes. The government should aim to remove the rigidity in the processes involved in forming policies. The government should also strive to seek accountability for the resources that it disburses for use in the education sector and

other sectors. The argument for seeking accountability is that cases of corruption will reduce drastically, thereby increasing the financial resources available for use in the education sector. The government should put in place measures to ensure that there is a regular revision of the education curriculum to aid in updating everything related to education in Bangladesh.

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A Sketch of Reality: The Multigrade Classroom in Context of the Reform of Basic Education

Abstract

The Mexican educational reform is based on transformations towards the conception of a new world, as a result of technological advances and new knowledge communities, where the parameters are established mainly by various international organizations, and where countries implement, evaluate, integrate and describe the necessary conditions for education. The multigrade classroom and the elements that are developed in it are conceptualized. The critical pedagogy of Gramsci and Freire should be part of the teaching preparation.

Keywords: multigrade classroom, educational reform, critical pedagogy

Introduction

Mexico as a country is reforming its basic education system. This reform includes, among many other things, a new educational approach based on competencies and the specification of the entire curriculum at the basic level. Basic education consists of four phases: the first phase includes the preschool level, the second phase covers grades 1 to 3 of primary education, the third phase covers grades 4 to 6 of primary education, and the fourth phase includes grades 7 to 9 of secondary education lower level.

This reform arises from several studies and research of various international organizations such as: the World Bank (WB), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Organization for Economic Cooperation and Development (OECD), the Inter-American Development Bank (IDB) and the Economic Commission for Latin America (ECLAC), which made recommendations for educational improvement, as a means to secure a good quality of life, ensuring the development of rounded individuals, with the necessary skills to face the challenges of life and contribute to national and global development.

To achieve this, it is essential to adapt the comprehensive basic education reform to the educational context of Mexico. Therefore, this text analyzes and reflects on the multigrade classroom, in the context of the comprehensive basic education reform, as a sketch of a Mexican educational reality.

The quality indicators of basic education have identified serious problems of effectiveness in the majority of Latin American education systems. The fact that education is of poor quality deserves immediate attention from governments, as it has consequences for many activities, especially as economic growth and democracy

need people with better training. However, many attempts to improve basic education have not been successful (Mora, 2009).

Conceptualization

Conceptualizing the "multigrade classroom is the starting point for analysis. In Mexico, where the distribution of wealth is uneven and there are still large economic and social gaps" (Branko, 2017, p. 2), multigrade classrooms are most common in rural communities (Gutierrez, 2004, p. 3).

According to Santos (2011, p. 5), the multigrade classroom is a group of children of different ages and grades who share, not only the classroom, but also the didactic situation and, therefore, the knowledge that circulates there.

In the multigrade classroom, the teacher works at different levels of basic education. Primary education may be unitary, where a teacher attends to all grades, either alone or in a team with up to three other teachers. This depends on the number of teachers working in the institution, which is classified as incomplete in the Mexican education system.

This implies that in the multigrade classrooms students of different ages coexist, with very varied educational needs. The role of the teacher is fundamental in the classroom work, and the construction of knowledge in current plans and programs.

Ezpeleta (1997, cited by Santos, 2011, p. 4) explains that:

> *The multigrade classroom, rather than a response and a pedagogical strategy, was the result of an administrative operation that, in order to provide the service, found the solution of reducing staff in accordance with the number of students. Teaching, curricular content and administrative obligations were subject to the regulations of another school setting, the urban one, with one teacher per grade.*

Ezpeleta (1997, cited by Santos, 2011, p. 4) points out that the multigrade classroom is an administrative measure, which saves resources. At the same time, it implies an adaptation of conventional work in the classroom. The teacher teaches a level of understanding with some attempt to meet the development needs of students according to their age.

In this context, where students of different ages learn alongside each other, the classic educational formats are inadequate for the reality of multigrade teaching. This is where the current Mexican education reform will play a crucial role.

The reform of basic education

This reform has its antecedents from the beginning of 1993, when education focused on the learning of the student, favoring social practices. In 2004 the preschool curriculum introduced a competency approach. This continued in 2006 in the primary school and finally reached the secondary school in 2009. The result was a consistent content across basic education.

The objective of the reform is to promote the development of competences for life, achievement of the graduation profile, and the establishment of curricular standards for teaching and management performance (SEP-DGIE, 2003, p. 4).

But whether this objective should be dictated by the government, the citizens, the students, the teachers, the parents, or the unions is not simple. It can only be

resolved by taking up critical pedagogy, especially Gramsci's views on hegemony and culture (Broccoli, 1979, p. 3).

Globalization itself, a new knowledge society and the various international organizations with economic and political power have set the standards for the conception of the world. "Hence it is not possible to isolate the philosophy of politics, demonstrating that choice and criticism of a worldview is also a political fact" (Gramsci, 1984, cited by Suarez, 2012, p. 6).

The current Mexican reform is based on this transformation towards the conception of a new world, as a result of technological advances and new knowledge communities, where the parameters are established mainly by various international organizations, and member countries evaluate, implement and describe the necessary conditions for what should happen in the educational field. The starting point is often a comparison of developed countries with developing countries.

While it is true that the reform is designed to meet the goals set by international pressure, especially the World Declaration on Education for All made in Jomtien in 1990, where the Millennium Development Goals were formulated, including teaching universal primary education and gender equality in access to education, a rethinking of education in Mexico was already necessary, taking into account that:

> *If every state tends to create and maintain a certain type of civilization and citizenship (and therefore coexistence and individual relations), it tends to make certain customs and attitudes disappear and spread others; the law will be the instrument for this purpose (next to the school and other institutions and activities) and should be developed so that it is in accordance with the end, as well as having the maximum efficacy and efficiency for positive results* (Gramsci, 2019, p .119).

This educational task of the Mexican state underpins the comprehensive reform of basic education, where the various actors must interpret its proper application. Teachers are among the main actors, and will have to break with traditional ways of teaching, and introduce a pedagogical model based on competencies.

The teachers' reaction to this reform has not been entirely positive, not because its educational contribution is rejected, but because it is often imposed by the government, before it is analyzed and accepted, as the government is convinced that it is appropriate for the Mexican context, and not merely a pedagogical fashion.

The most important thing about this reform is the articulation and difficulty of the content, which can support work in the multigrade classroom.

Recommendations for the work of the multigrade classroom in the integral reform of basic education

Being a multigrade teacher is a great challenge, as well as an opportunity for professional enrichment. Teaching creativity is put to the test and there is a need for continuous innovation in educational practice.

Since the multigrade classroom involves a complex movement of knowledge, the teacher must plan his or her work, adapting it to the context. Since students will generally navigate between the knowledge of a grade lower or higher than their own, content organization is crucial.

> *In the multigrade classroom, the organization of the content is the foundation of didactics, as it is from this element that the rest is triggered (times, spaces,*

> *resources, class organization, interactive relationships, evaluation), according to the degree of complexity involved in the simultaneous work of several grades integrated in the same group* (Santos, 2011, p. 4).

Paraphrasing Santos (2011, p. 3), planning in the multigrade classroom should contain at least the following elements, which can be understood as a framework that will support teaching.

1. **Variety of learning forms**, including mutual learning, in pairs or in groups, collaboration, tutorials and work modalities: whole group, fixed subgroups, rotating subgroups, work commissions, and individual work.
2. **Interactive relationships**: communication and emotional ties between teacher and student, and between the students themselves, to foster autonomy, trust and delegation of responsibilities that are fundamental for an appropriate work environment.
3. **Distribution of spaces and times**: this should be optimized, so that the expected learning can be achieved. The very nature of the mobilization of knowledge means that students may need more time to be involved and participate.
4. **Curriculum materials or teaching resources**: the multigrade classroom has an important advantage in a rural context, with a rich diversity of flora and fauna, but where it has the great disadvantage of lacking access to information technologies.
5. **The sequence of didactic activities**, for the achievement of the expected learning. This tool is fundamental to the achievement of the objectives, despite the diversification of contents in each grade.
6. **The evaluation and development of relevant instruments**: this will allow constant monitoring of teaching-learning. The approach will mainly be formative and a wide variety of instruments can be used, including rubrics, a checklist, and portfolios.
7. **Organization of contents**: this is the main point of multigrade work, since it will be necessary to have clear the differentiation of contents for correct and efficient application in the classroom.

All these elements form an overview of what the teacher should consider in his or her work. For this reason, it is considered necessary to recap critical pedagogy, which is seen as:

> *But how to carry out this education? How to provide man with means to overcome his magical or naive attitudes towards his reality? How to help him create, if he was illiterate, the world of graphic signs? How to help him commit to his reality? This could only be achieved with an active, dialogic and participatory method* (Freire, 2017, p. 101).

The multigrade teacher must carry that development of critical thinking in the blood, since various situations will require this analytical-critical competence if the goals of Mexican education are to be achieved, and traditional pedagogies, especially "banking education" (Freire, 2005, p. 75) and the "simple" lecture class, are to be left behind. Professional practice will start from the consideration of the environment.

For Freire (cited by Hillert, 2008, p. 6):

> *Evil is not really in the lecture class, in the explanation that the teacher gives. That is not what characterizes what I criticized as banking practice. There are lecture classes that really are not simple transfers of accumulated knowledge from the teacher to the students.*

In this sense, the multigrade teacher is responsible for ensuring that the learning of students is appropriate, and this will reduce the waiting time between activities. For this, it is recommended to apply multiple teaching strategies and methods in multigrade teaching, and not just the traditional lecture class.

Common activities: "The key to multigrade work"

One of the strategies that has worked in the multigrade classroom, is described by the Ministry of Public Education:

> *Attention in the multigrade classroom involves working on a common theme with specific activities and / or content for each cycle or grade. It is intended to reduce waiting times, allow greater attention to students and deepen the topic, promote collaboration, mutual help and mentoring - older children support the youngest children - stimulate the sharing of knowledge acquired to support feedback on the topic and attend to the level of learning of the students by leaving specific activities for each cycle and / or grade* (SEP-DGIE, 2003, p. 2).

Common activities imply a recovery of previous knowledge of the students of all grades and thus introduces them to the construction of the specific knowledge of their own grade, achieving the development of the expected competences. This generates a mobilization of knowledge, enriching the content and at the same time allowing multiple forms of interaction, which the teachers must use to support their practice.

Conclusion

Sadly, Mexico has implemented the educational reform due to economic pressure from various international organizations and derived from globalization, rather than to meet its own development needs. Even so, it is helpful that the reform develops the contents of education, because they benefit the work of the multigrade classroom, even if they are not designed for this.

Through the educational reform, the state should develop policies that favor equity, equality and inclusion. Multigrade schools cannot achieve this, because of shortages of human and material resources. If organizations do not have an effective manager, the teacher will have to perform the administrative tasks, as well as attending to several grades' educational needs. This type of school is denied the support and educational assistance required.

While it is true that multigrade schools require more attention, the responsibility for their success rests with the teacher. The critical pedagogy of Gramsci and Freire should be part of the professional preparation of teachers. Teachers must prepare for the challenges of their daily practice, and this, as mentioned, requires creativity and innovation.

This educational reform should address the seven elements described by Santos (2011, p. 3): the variety of forms of learning, interactive relationships, distribution of space and time, curricular materials and teaching resources, sequences of teaching

activities, evaluation and the development of relevant measures of performance, and the organization of contents. In addition, the Ministry of Public Education recommends the incorporation of common activities at the beginning of each learning sequence.

There are no magic solutions in the multigrade classroom, any more than in any other type of education. The correct formula will be one where the actors-subjects in education are aware of their work and responsibility, and that the public policies that are derived from educational reforms make sense, following critical analysis. We must never lose sight of the fact that every policy is steeped in various interests, which may or may not suit the development of the country.

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Part 4
Higher Education & Teacher Education and Training

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Impact on Student Learning: The Contribution of a Professional Development Collaboration

Abstract

Schools of education are often criticized for not effectively preparing teacher candidates and teacher education research has been criticized for lack of rigor in examining the impact on student learning. Teacher preparation accrediting agencies have responded with requirements for programs to demonstrate the effectiveness of their graduates based on their students' achievement. This has proved challenging for programs that lack access to student achievement data. To examine teacher effectiveness, one mid-size state university devised a strategy using publicly available state data.

This case study presents an analysis of the mathematics performance of students as it relates to a Professional Development School program for cooperation between Laurel Woods Elementary School and University of Maryland, Baltimore County (UMBC). With almost 50% of the school's 1st through 3rd grade teachers being UMBC graduates, this analysis of 3rd grade achievement data provides insight into the impact of teacher education graduates on their students' achievement. The study compares Laurel Woods' overall and subgroup data with that of the state. The results indicate that teacher education programs and Professional Development School partnerships can contribute positively to the success of schools where a high proportion of teachers are from one teacher education program.

Keywords: teacher preparation, assessment of teacher performance, student learning, professional development schools, low-cost evaluation, impact of teacher education on schools, preservice teachers

Introduction

Recognizing that teachers play a critical role in determining student success, teacher education endeavors to provide prospective teachers with skills and experiences needed to enter the profession as highly skilled Pre-Kindergarten through grade 12 (PK-12) teachers and ready to maximize PK-12 student outcomes. However, critics often identify schools of education as the weak link in the preparation of teachers, arguing that teacher candidates are the lowest performance population in the university, take the least number of rigorous courses, and are so poorly prepared that fifty percent leave the profession in five years (Fraser & Lefty,

2018; Walsh, 2001, 2020; Tucker, 2018). Furthermore, teacher education research has come under fire for lack of rigor in attention to impact on student learning (Walsh, 2001, 2020; Tucker, 2018). Accrediting agencies such as the Council for the Accreditation of Educator Preparation (CAEP) responsible for the quality of teacher education programs responded to these criticisms with a number of policy changes to improve outcomes. One such change was to require teacher education programs to demonstrate the effectiveness of their graduates in their school settings based on student achievement (Darling-Hammond, 2020). The difficulty is teacher education programs are required to measure performance based on data which is under the control of a separate organization, the school district, whose concerns include personnel privacy, data security and student confidentiality.

It is important that teacher education programs examine the quality of teacher preparation and strive for continuous improvement. Although a teacher's success as demonstrated by student achievement is often considered to be indicative of her/his preparation program, universities have historically not been able to follow their graduates and review their students' data for purposes of program improvement due to lack of institutionalized tracking structures and teacher and student confidentiality concerns (Fraser & Lefty, 2018). This leads to the question of how best to measure the impact of teacher education programs on PK-12 student success.

In response to on-gong criticism of teacher education programs, the State of Maryland, where this study took place, committed to improving teacher education through a policy document entitled *The Redesign of Teacher Education* (1995) (Putnam & Walsh, 2019; Clemson-Ingram & Fessler, 1997). A core element of that policy proposed Professional Development Schools which were codified in regulations in 2007 (Clemson-Ingram & Fessler, 1997; Darling-Hammond, 2020; Professional Development Schools, 2007). A Professional Development School (PDS) is a collaboratively planned and implemented partnership between a university and specific PK-12 schools for the academic and clinical preparation of preservice teachers and the continuous professional development of both Local Education Agency (LEA) staff and Institutions of Higher Education (IHE) faculty. The focus of the PDS partnership is improved student performance through research-based teaching and learning. Over the years since their introduction, IHEs and LEAs worked to enhance the PDS experience for preservice and inservice teachers. Recent research on well-developed PDS partnerships suggests that graduates of these programs feel more confident and prepared and are rated as more effective by employers and supervisors, and inservice teachers who participate in the PDS partnership also see the collaboration as beneficial for their practice (Darling-Hammond, 2020).

Standards and processes were put in place by the state to assure compliance with the PDS mandate through onsite reviews of teacher education programs that included a review of selected PDS partners using an assessment system that evaluated the partnership based on five standards linked to four components. The standards established goals for learning communities, collaborations, accountability, organization, and diversity. Each of these standards were examined from the perspective of four components: teacher preparation, continuing professional development, research and inquiry, and student achievement (Professional Development Schools, 2007).

Over the years since the implementation of the PDS standards, little has been done to assess the impact of PDS programs on student learning. This dearth of research reflects the difficulty in establishing a strategy for assessing the impact of teacher education programs on schools given the complexity and cost of the undertaking. Even though student achievement was the intended outcome of the PDS model and one of the four components of the standards, rarely did programs address the accountability component of the standards which is stated in two indicators:

1. PDS stakeholders assume responsibility for improving PreK-12 student achievement.
2. PDS partners collaborate to determine the impact of PDS on student achievement.

Addressing this component of the PDS standards as well as the impact of our graduates is the intent of this study.

Context

By the year 2000, the IHEs with teacher preparation programs in Maryland had established memoranda of understanding with local school districts to meet the requirements of the PDS regulations. The University of Maryland, Baltimore County (UMBC) Education Department created PDS programs with multiple elementary and secondary schools in five school districts throughout the Baltimore-Washington area. Many of these PDS partners were in place by 2003 and expanded in 2007. One of the expansion PDS sites was Laurel Woods Elementary School (LWES), a suburban school near Washington, D.C., which is the subject of this study. LWES was selected as a PDS after discussions with the Howard County Public School System's (HCPSS) Office for Professional Development Schools and LWES administrators and teachers who determined that the school population and UMBC preservice teachers could mutually benefit from the collaboration.

LWES is a diverse school facing many challenges. In 2018, LWES served 611 students from kindergarten through fifth grade from North Laurel, Maryland, and the enrollment keeps increasing, thus surpassing the maximum capacity of 609 students which the building can hold. There are four or five classrooms at each grade level with an average of 22 students in each classroom. The school is a majority-minority school with 52.1% of the population identified as African American, 23.7% Hispanic, 9.5% Asian, 7.5% white, 0.3% Hawaiian, 0.3% Native American, and 6.6% identifying as two or more races. Approximately 60% of the students receive free and reduced meals, 9.0% receive services for English language learning, and 9.5% receive special education services. LWES is earmarked as a Title I school, which means it has more than 40% low-income families, and therefore receives additional support such as mathematics tutors, reading support teachers, and after-school academic support programs to improve student academic performance and quality of life.

LWES started the PDS partnership with UMBC to serve the Early Childhood and Elementary Teacher Education programs as well as enhance education for the children of the Laurel Woods community. Through the collaboration, UMBC provides a University Liaison to work in the school one day a week providing professional development and support for both preservice and inservice teachers.

The school also selects a faculty member to serve as the PDS site liaison facilitating communication and professional development opportunities between the university and school. As a part of this partnership Laurel Woods hosts preservice teachers completing their 28-week early childhood and/or elementary field experiences. In their first semester they participate 2 days per week in one classroom with a mentor teacher who is jointly selected by the school and university. During the second semester, they teach full time in that same classroom taking over all teaching responsibilities for several weeks during their 80-day rotation. In addition to the UMBC assessment of preservice teachers, HCPSS personnel also evaluate them for the purpose of employing successful candidates as teachers in their schools.

Graduates of UMBC are often employed by HCPSS and specifically at LWES based on their successful internship. While UMBC graduates receive positions across the district, during the 2017-2018 academic year, LWES employed six UMBC graduates of their thirteen first through third grade teachers representing almost half of the classroom teachers in these early grades. This high percentage of UMBC graduates working in one school created the opportunity to use this naturally occurring site for a study of program effectiveness.

Teachers graduating from UMBC with certification in elementary or early childhood education receive degrees in academic fields such as psychology or mathematics as well as their certification. The average teacher comes from the upper third of all high school graduates who take college entrance examinations. Teachers from UMBC have course work and field experience in diverse learners, culturally responsive pedagogy, and methods of instruction, as well as a year-long internship under a mentor teacher trained in working with UMBC students. LWES continues the support and integration of teachers into their school so that students experience a consistency of methods, language, and classroom management regardless of their class assignment.

Theoretical framework

Work done by the Rand Corporation and others suggests that teachers and schools contribute to student learning (Opper, 2019; Xu & Swanlund, 2013; Rivkin, Hanushek & Kain, 2005). Further, coherent, long-term professional development is demonstrated to be an effective model with extensive practice after implementation leading to a positive, long-term impact on teacher performance and student achievement (Yoon et al., 2007; Polly et al., 2018). To the UMBC faculty, this strategy of long-term practice for professional development is modeled by Professional Development Schools such as LWES where a long-term, coherent and developmental program is the model for inducting teacher candidates into a school setting and enhancing skills of experienced teachers in the school. Furthermore, the nature of mathematics curriculum usually means that it is learned at school, whereas other areas, like literacy, may demonstrate more of a parental or family influence (Sonnenschein, Stites & Dowling, 2020). Therefore, this study examines mathematics scores because it is more indicative of teacher influence.

As noted in the Rand report, “many factors contribute to a student’s academic performance, including individual characteristics and family and neighborhood experiences. But research suggests that, among school-related factors, teachers matter most. When it comes to student performance on reading and math tests, a

teacher is estimated to have two to three times the impact of any other school factor, including services, facilities, and even leadership" (Opper, 2019, p. 1). However, it is important to consider that the teacher performance is nested within the school and that it is difficult to separate the contribution of the teacher to school performance and the school's influence on the teacher (Xu & Swanlund, 2013). This is supported by recent research from Ronfeldt et al. (2018) that indicated one major element of success of preservice teachers is employment in the school where they had interned.

Methodology

An impact study was designed in three phases to examine the effect of the PDS program and UMBC graduates on student learning. The three-phase design reflects the complexity of examining teacher performance, the availability of data sources, the questions addressed in the study, and the potential for cost or privacy concerns. Not all phases have been completed at this time. Each phase of this study contributes a perspective on the school and student learning that, when brought together, provide a more complete understanding of teacher effectiveness and the impact of the teacher preparation program and PDS partnership. Phase I, the focus of this study, utilizes public records available to the university researchers on state and local websites and related institutional reports from HCPSS. Phase II includes interviews and focus groups with teachers, administrators, and UMBC personnel assigned to the school. Phase III involves data requested in Fall of 2015 by the UMBC Department of Education, but data on individual teachers' evaluations or their specific students' performance were not made available by the school district for privacy reasons. This is an ongoing conversation with the school district, but in the meantime, this made the public data even more essential to understanding UMBC's contribution to student learning.

The Phase I strategy was undertaken in spring of 2018 using publicly collected data that was part of state-mandated assessments. This made the data for the Phase I study both a low-cost and an unobtrusive strategy. Data collection was conducted by the school as part of its yearly assessment, making it a no-cost method to determine effectiveness. The study did not require HCPSS or UMBC Institutional Research Board approval as data was available from the district and state websites. The study did not intrude on the school routines or reduce instructional time and, finally, it responded to criticism leveled at the lack of performance data of graduates of teacher education programs while meeting CAEP national accreditation standards for linking standardized testing outcomes of students to our graduates' instruction.

The UMBC research team proposed studying the performance of students in third grade rather than all grades because UMBC's graduates contributed extensively to student learning and the student test performance in the first three grades at the school and public data was available beginning in grade three. The research team believed findings on the school performance then could, in part, be attributed to the effectiveness of UMBC's graduates and the teacher education program. The research team recognized that specific teachers could not be linked to specific student outcomes as the public data is reported at the grade level rather than the classroom level. However, drawing on teacher effectiveness research and school effectiveness research, the research team concluded that the teachers acting together can be both individually effective and, more importantly from a school and student

perspective, can be an effective instructional team. The research team also recognized that the school environment contributes to the teachers' accomplishments just as teachers enhance the school's success.

Teacher performance data as measured by value added methods is considered by CAEP as the standard for assessment of Education Provider Programs. Some states have that data available through a statewide assessment system. Maryland does not have that kind of a system in place nor do they currently have systems that permit the tracking of teacher candidates once they have left their certification program. Without ready access to teacher-by-teacher student performance data, the UMBC Education Department needed to come up with alternative means of assessing graduate and program impact on PK-12 student learning using mixed methods and multiple data points. Public domain data was collected in June of 2018 to establish baseline information on the school and to determine what questions might be most appropriate to ask university personnel, teachers, and administrators in later studies. With test performance on a teacher-by-teacher basis not available currently in Maryland, UMBC uses school-level data as a proxy by examining test performance by grade level and subpopulations within the school. These findings are then compared to state level data.

The teachers included in this study were UMBC graduates of the early childhood or elementary programs and full-time teachers at LWES in grades one through three. Three out of five teachers at the first-grade level, two out of four teachers at the second-grade level, and one out of four teachers at the third-grade level were UMBC alumni. The data presented in this study examine third grade because that is the grade level in which test data is available. The third-grade scores reflect learning at the first and second grade as well as third grade, and can, in part, be attributed to those teachers. There are no state or nationally normed tests available to the researchers for students in first and second grade. Upper grade scores were not reviewed as Laurel Woods has not employed a large number of UMBC teachers in those grade levels.

The data analyzed came from assessments designed for grades 3-8 by the Partnership for Assessment of Readiness for College and Careers (PARCC). PARCC was specifically designed as a means of measuring student achievement of the Common Core State Standards (CCSS) in English Language Arts and math. The tests provide students with a scaled score that is then used to place them in one of 5 achievement levels to determine if they have met or exceeded standards: Level 1 "Did Not Meet" expectations, Level 2 "Partially Met" expectations, Level 3 "Approached" expectations, Level 4 "Met" expectations, and Level 5 "Exceeded" expectations (more info on PARCC can be found at http://mdk12-archive.msde.maryland.gov/assessments/parcc/index.html). For the purposes of this study, we will be comparing the percentage of students in the school and the state that met and exceeded expectations in math.

This study compares LWES overall student population scores with state overall student population scores as well as examining subsets of the student population to determine if the school is meeting a major goal of the school district and the state to reduce achievement gaps between subgroups. For LWES, the subgroups that we are focusing on are African American, Hispanic, and Free and Reduced Meal subpopulations because these groups are ones that are of concern.

Results

An analysis of LWES scores in comparison with the other schools in the state demonstrates that it is a successful school. The LWES African American population percentile at the Exceeded level (6.1%) almost doubled the African American State percentile at the Exceeded level (3.7%), while LWES African American students at the Met level (32.7%) were almost 10 percentage points higher than the state African American students (22.4%). The overall percentile for African American students who Met or Exceeded expectations at the state was 26% while at LWES it was 38.8%, which is over 12 percentage points higher than the state. Similarly, the percentage of African American students at the state who achieved at the Did Not Meet level was 22.6%, while at LWES it was only 10.2%, which is 12 percentage points lower than the state African American population and 4.1 percentage points lower than the overall state population.

The percentage of LWES Hispanic population that Exceeded or Met standards according to PARCC also far surpassed the state Hispanic population with 12.5% versus 4.6% in the Exceeded category and 29.2% versus 23.7% in the Met category. Overall, 41.7% of Hispanic students at LWES Met or Exceeded standards compared to 28.3% of Hispanic students across the state. The percentage of students in the Not Met category at LWES (8.3%) was less than half of that for the Hispanic students across the state (19.6%). In fact, the percentage of the Hispanic student population at LWES who Met or Exceeded standards (41.7%) was similar to the percentage of all student populations across the state (43%).

Furthermore, LWES has a Free and Reduced Meals (FARMS) population of approximately 60%. FARMS is often used as a proxy for determining low socioeconomic status (SES) in a school. According to previous studies, low SES can result in an 18% difference in scores compared to a high SES population (Baird, 2012). Baird argues that the difference between high and low SES performance is one standard deviation. Based on the low SES of the majority of students at LWES, it would be expected for them to have scores significantly lower than the state average.

However, our findings indicate that LWES had only 0.4% fewer students on average at the Exceeded level and is actually 3.2% higher at the Met level. Overall, the LWES percentage of students that Exceeded standards was 45.7% compared to the overall state population at 43.0%; the LWES population was 2.7 percentage points higher than the state, and well above Baird's estimation for performance. Of equal importance, LWES has only 9.5% that Did Not Meet standards while 14.3% of the state population are in the category of Not Meeting the standards, closing the gap at both ends of the performance measures.

Given research that identifies teachers as a salient contributing factor in student outcomes, this examination of student achievement suggests the effectiveness of teachers prepared through the PDS model as well as their positive impact on student achievement. Students from sub-populations who often underperform on standardized assessments did better at LWES than their counterparts across the states.

Discussion

This study compares performance of third graders at LWES to those across the state of Maryland. While these are not statistically equal groups on any measure, all members of the population were included. In the end, third grade students at LWES outperformed their peers from other schools, including those with lower percentages of FARMS and ELLs. LWES students' strong performance in math across all subgroups and economic conditions must credit the school's effective instruction. The authors recognize that no one single lever will improve a school's academic performance. However, the research literature supports that teachers are a major contributing factor in student achievement and that long, coherent training and practice is an effective strategy to improve teacher performance and student learning. The contributions of the school to individual teacher's performance and individual teacher contributions to overall school performance is difficult to separate, but the findings are encouraging that available measures can establish linkages among cadres of teachers and their students' performance.

The findings support both the value of PDS programs and UMBC education programs in the superior performance of the school against similar populations statewide. The contribution of PDS programs through the involvement of interns prior to their employment at the school and the long-term development of a teaching staff through the internship process yields substantial success in comparison to similar student populations throughout the state of Maryland. The PDS model offers a pathway for teacher development and school achievement, and the PDS standards require assessment of PDS impact on student achievement that is often difficult to assess. The use of publicly available data from the school forms a basic if imperfect source for developing reviews of programs. The development of a longitudinal database now being created by the state may offer additional data for comparisons both within and across schools with similar programs or similar demographics. Until then, this type of analysis provides some insight into the potential benefit of the PDS model for student outcomes.

Policy implications

While we agree with our accrediting bodies that it is ideal for educator preparation programs to assess the effectiveness of their graduates, we know first-hand the challenges of doing so within our current system. Professional Development Schools not only provide preservice teachers with rich, supported teaching experience and IHE faculty with opportunities to better understand the current context of teaching, they also provide a potential avenue for studying our graduates' impact on student learning. The UMBC Department of Education will discuss these findings with our PDS partners and encourage them to develop extended, qualitative and quantitative analysis in collaboration with the department.

Future studies

While it would be preferable to compare the school's math scores from before the establishment of the partnership to after its implementation, it was unfortunately impossible to do so because the PARCC assessment was not in use when the

partnership was established in 2007. There are clear limitations to using student achievement data as the sole means of evaluating teachers and education preparation programs (Darling-Hammond, 2020). In addition to being difficult to access the needed data, many have called into question the ability of standardized tests to adequately capture all that students learn and teachers teach. This is why an in-depth qualitative study of the internship and beginning years of teachers at LWES as outlined in the remaining phases of our study is necessary to provide more specific findings that could support and expand our understanding of the potential impact of PDS on teacher preparation. Additional studies of other settings where UMBC has a major presence could determine if these findings are consistent across other schools.

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New Challenges: Developing Explicit Pedagogies of Noticing

Abstract

This paper is about an instructor in a university teacher program aiming at improving the students' ability for noticing in order to guide subsequent decision-making and actions in teaching. Whereas added awareness may come naturally to some people, others need to develop a habit and a way to identify important aspects. University students tend to surf the net at high speeds for a quick overlook of contents. While this is a great ability, they often do not stop long enough to identify what needs to be retained. For teaching purposes, it is crucial to learn to anticipate, develop the appropriate noticing strategies and to act, as this is a professional requirement.

After discussing contextual aspects, we describe the actual problematic and follow with the relevant theoretical underpinnings. Within these, we look at strategizing, developing awareness, and the capacity to act. The method used is qualitative and involves the analysis of the instructor's teaching journal notes. Findings point to the need for variety in activities, looking at pace and affinity in communities of practice as well as storage into memory leading to subsequent action.

Keywords: noticing in teaching, mastery of content, professionalization

Introduction

Teaching practice includes an awareness of differences which has developed in training programs so as to identify remedial actions.

Moreover in on-line teaching, an instructor, whose main role initially was to see to the assimilation of course contents, as for instance, in the course observed in this study to train students to become French as a second language teachers, is required to take on much more complex responsibilities.

There is a need to be fully engaged when preparing to teach. Thus the importance of the capacity for noticing.

The courses in this study followed the flipped classroom approach to enable the rehearsal of knowledge through follow-up in-class activities, based on prior preparation of learning documents. Responsibility for understanding the concepts rested mostly with the students while preparing for class, while the in-class activities aimed at consolidation to help processing the contents and promote their assimilation and to increase noticing.

Methodology

The method used is qualitative for uncovering details of particular teaching-learning moments as entered in the instructor's journal and later subjected to text analysis. The text consisted of instructor's teaching notes as well as class

observation notes as in the regular process to gather information to improve upon one's teaching. This was new in the context of on-line teaching, with only video conferencing with the students in classes. For this paper we concentrated on the notes dealing with noticing.

The site was a university setting with students in their fifth and sixth year and enrolled in teacher preparation courses. The notes were taken while teaching on-line which took place from April to December, 2020 and across six classes at different times.

I carried out observations, taking notes of a task they set, a pattern of speech they employed, a gesture they used, a question they asked and any other such items, which could help improve noticing and learning as advocated in research (Mason, 2002, p. 30).

The students were asked to note important items during their assigned readings. The different contributions from home assignments were discussed in groups at the beginning of the class which in turn led to establishing an order of priority for things noticed to be reported to the whole group. During each class, new ideas were contributed for students to understand the concepts to be mastered in different contexts.

During class time, activities were completed based on the prior preparations carried out.

Theoretical underpinnings

Strategize and anticipate

Noticing entails concentrating on something. Researchers in visual cognition (Brophy, 1998; Currie, 1995; Amabile, 1996) state that concentration increases when both creativity and necessity are present, therefore to create applications accordingly makes sense. These two modes of mental functioning are independent and used in survival contexts with people being more alert, so they were activated to improve outcomes. Simulations around such situations worked as a teacher would need to identify critical moments.

With many pupils in classrooms an ability for multitasking would be desirable, so reducing time required for tasks is a must. This would entail developing noticing activity to the point of making it 'automatic', in line with Leontiev's (1978) notion of habit development. According to research, we can proceed, either, through continuous realignment, and imitation, or by reducing the number of conscious techniques or processes we usually carry out. It is a matter of adapting to new ways and adopting a number of useful strategies. So practicing over time is a must.

For instance, in the medical field there are different kinds of observing activities for various purposes. Patients are observed and changes noticed require actions (Tanner, 2006; Watson & Rebair, 2014). As well experienced teachers observe their students and if necessary they appropriately intervene (Barnhart & van Es, 2015; Stürmer & Seidel, 2015).

Awareness and mindfulness

Mindfulness in communities of practice is more effective as people in groups go from looking at their single ways of doing to an awareness of forming patterns and

observe deviations in groups. Moreover, because of events that materialize in ways that were not necessarily as anticipated, dealing with oddness increases noticing and learning through better storage into memory.

As language is involved, Bygate (1987) sees two categories in the actual uttering of learned contents, with concentration on understanding plus an unfolding into action. He suggests that first one takes on understanding of how to carry out the strategies, then, one has to actually use the capacities in effective production, which would correspond to the completion of tasks and activities in class.

This boils down to also equipping students with tools to guide what they are expected to notice. Such tools need to take into account not only the different foci for noticing but place these in a wider frame of reflective practice that will lead to the development of professional vision and framing.

Capacity to act

Learners need not only notice what is needed of them, they need to utilize important information and direct their own learning activities in the direction required by a clear understanding of the circumstances in which they find themselves and where they wish to end up. Self-direction and self-regulation are initiated by noticing or are preceded by it. This is also what Boud and Walker (1990) describe as noticing in their discussion of reflection in learning from complex educational experiences. It involves a cycle of noticing, intervening, reflection on the outcome, leading to further noticing, intervention and reflection. This corresponds to Schön's (1983) notion of learning from reflective practice and comes from the tradition of experiential learning. Noticing can thus be seen as a component of reflection. However, the reflection literature tells us little about the noticing or observing phases of learning cycles. For learning to be assured, however, students must approach a situation with an intent to learn which is a powerful shaping influence on what they attend to (Boud & Walker, 1990). In addition to keeping students engaged, special characteristics for observations and simulations have to be developed to increase noticing. An efficient and effective way to carry this out is through team-work with back and forth questioning and reflections.

This emphasis on activity is crucial. The development of neural connectivity is activity dependent. This means that a lot of practice helps.

Findings

From the analysis of instructor's journal notes on aspects addressed above, we uncovered a number of issues and desirable strategies to be implemented in order to develop further actions for noticing.

Student engagement

Across the different groups, various activities were designed around simulations, some requiring creativity (i.e. group members imagining living together as a family) while others were built around necessity (i.e. create a financial literacy lesson around a limited budget) in order to increase noticing. Outcomes were generally excellent, however there were a variety of activity levels noticed. In group

work the students all came together, nevertheless they displayed very diversified capacities which made the workload uneven.

The distribution of activity in groups seemed uneven as some students carried out most of the responsibility for the tasks, which presupposed an already high degree of noticing. Others seemed less aware. The intent had been to give students the preparation time they required ahead of class so they should have been equally ready.

There always seemed to be leaders who led the discussion on how to go about the task. Group members participated in the discussion suggesting different strategies and it was obvious that they projected steps and possible outcomes in their minds, delineating pathways for task completion although they intervened in different ways.

Pace

Advanced students could carry out the work very quickly. Noticing in professional contexts has to be followed with quick action but it also requires the ability for a weighting scheme in noticing, i.e. being able to sort out what is important. The problem with follow-up assignments in class was confronted to the differences in students' paces. During class task completions some students were also consulting the assigned texts rather than their notes on them, which slowed them down. The question is whether or not they had done their homework. Another issue could be related to their inability yet to separate important aspects from trivial ones. Therefore, unevenness in background preparation and yet unsatisfactory levels of pedagogical awareness showing in some students, pointed to them requiring more time. A factor that came into play was attention to detail.

Those students who took more time often also took into account more aspects. Moving fast was not necessarily positive.

The importance of affinity

Initially students were told that they could switch groups. No-one moved to another group although some group members worked at different paces, however they always completed the tasks remarkably well. Clearly the students' groups came together as communities of practice in their noticing tasks.

Only one student asked if she could work on her final assignment, a backward design project, with her friends, from another group. When questioned whether it had to do with cooperation, the student said no, rather she felt that as she had known the others from previous university years, they would carry out the tasks more efficiently. The issue was concern over the grade to be obtained.

Storage into memory

Motivation varied among students and some also had not retained all the key processes that they had worked through. The question raised was whether they carried out their work seriously. This also has to do with selectivity. With prior preparation of texts and subsequent in-class actions to reinforce learning, the concepts presented should have become internalized. Some students felt they had gained the knowledge in a general way; however when questioned they could not provide specific answers.

Discussion

Willingness

Billett (2016) argues there must be some intent to learn from observing practice. For professional judgement you need capable noticing and this entails the ability to notice salient features in teaching.

Often noticing itself is generally an implied feature in observation and is treated as non-problematic. However visual cognition specialists suggest strategies for noticing including a willingness to concentrate and to understand the new information, in line with Boud and Walker's (1990) suggestions.

It would be a good idea to set up a discussion board for each group for each different task or activity to be completed, but not use the one set-up for the whole class. This would allow group members to interact in order to come up with their notes on the prepared materials, yet not give them the capacity to use other groups' work to adapt and hand it in as their own. It would make them more responsible.

High levels of activity for task completion allows to focus attention more. Hence the need to also concentrate on a visual object, using graphs, videos etc., add physical activity with movement, coaching style activities, resort to creative approaches, also including different sound tracks and music, with in addition miming or acting in role playing, or all in combinations, for superior outcomes. There may be more engagement if participants were also assigned to produce their own individual product. This way there would be further practice and the instructor could see further deviations and provide individual feedback.

Pace

It is necessary to remind all the students of the learning gains through distributed participation in noticing, in order to carry out tasks more efficiently. Perhaps a solution could be an approach to learning with student groups only coming to meetings with the instructor when they feel they had grasped the material. That would give everyone the time needed. It could also require having students take a quiz within given timelines to keep the program in line with expectations and outcomes so as to establish whether or not students are on the right track.

Affinity

The social interaction in affinity groups getting together was definitely a positive aspect. Although the "success for all" approach in evaluation was explained, some students were still stuck to a traditional evaluation method and very competitive. They expressed their complaints about feeling that they deserved to be recognized individually for superior work. The idea was to get them to understand the cooperation and collaboration involved for the success of all. Overall group pace needs to be monitored more closely over time and perhaps advice be given on how to address various ways of being and doing i.e. acknowledging diversity, being inclusive, and equitable although students are supposed to have this training.

Internalization

There is clearly a need to present strategies for effective group work to the students, like for instance, assigning them changing roles from one session to the

next. Perhaps requiring them to have a responsible team captain to collate every group members' contributions weekly, might ensure that they get a head start and do not just prepare at the last minute and ensure working on materials for better retention, with the in-class activity serving as reinforcement. The importance of their involvement in the activities has to be stressed as regards its importance in the assimilation of the concepts that were under scrutiny.

Conclusion

To sum up, this was a study on increasing noticing in a teacher preparation program. The intent to use the flipped-classroom approach was to direct students in their class preparation materials to noticing more of the contents to be covered initially. Plus during the follow-up classroom activities, for some lessons the emphasis was to create more concentration on noticing. Overall students developed more awareness, although for some a certain degree of awareness already had been present which points to individual difference.

This took place in the context of on-line teaching which made continuous observation impossible, nevertheless regularly joining breakout rooms enabled the instructor to glean a lot of detailed information.

Although group work was key in supporting all students, it appears that in some cases students would need to be required to carry out a follow-up activity entirely on their own, if one were to have to judge the level of their efficacy in noticing.

As these students also had school practicum placements, the added experience would have helped them further develop their capacities for noticing. There definitely should be closer coordination between course work and school placement to provide more support and better articulation.

As regards in-class training there are a number of aspects to take into consideration.

Recommendations

Increase interest and engagement

More variety could be proposed in tasks to be completed to keep everyone engaged in noticing, perhaps along the lines as the concepts used in programmed learning.

Different activity levels should be created, perhaps with a sliding scale of grades to be assigned. As well, students could be more involved in instructing some others in their groups, to support the instructor’s effort in identifying and catering to their needs, in turn, this also increases noticing.

Monitor pace

Due to some inability to separate important from trivial aspects, additional training should be provided.

Role switching among group members would increase awareness of reflectivity in contributing. A better articulation between class-work on noticing and field work would be more efficient.

Community

Placing the focus on the activity to be completed and giving groups different activities to choose from, might direct students to different peers based on their interests which may also get the groups to complete the activities faster with distributed knowledge.

Action

To increase mastery of the items under scrutiny, it may be necessary to have short exams or quizzes to reinforce the importance of what is to be learnt and with additional review increase memory storage.

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Challenges Experienced by Lecturers in Supporting Students at an Open Distance e-Learning Institution

Abstract

Institutions of higher education in South Africa have seen a shift in the student demographic of student population, and from contact teaching approaches to distance and online approaches to instruction. This has posed challenges as students find themselves without adequate support in online environments to successfully fulfil their studies. There are few studies that focus on the challenges lecturers experience in an open distance e-learning (ODeL) setting. This paper seeks to narrow that gap by exploring the challenges experienced by lecturers in an ODeL institution, which offers massified higher education for part-time students. The study is aimed to determine and explain how lecturers could use their concerted skills to benefit students. The research is embedded in Moore's transactional distance theory and adopted Vygotsky's social constructivist approach. In terms of methodology, a qualitative research approach with a phenomenological design was used. Data were collected through open-ended semi-structured interviews from participants of the College of Education (CEDU) at the University of South Africa (UNISA). Transcription and thematical analyses of data were completed to identify themes.
Findings from the study revealed that lecturers in CEDU were not inducted on their core functions hence the shortcomings in delivery of student support services. The study recommends that further research be conducted on how to support and empower lecturers within CEDU to give students leading-edge support.

Keywords: support challenges, ODeL experiences, distance learning, transactional distance

Introduction

Unisa is the largest ODeL institution in South Africa (Unisa, 2019a). The vision and value statements of Unisa aim to unite diverse cultures through education platforms and to guide students during the decision-making and strategic planning processes. The vision aims to achieve this in South Africa and globally, without compromising the standards of teaching and learning. This would require lecturers to possess cutting-edge teaching skills to realise Unisa's vision – "towards an African university shaping futures in the service of humanity" – which describes Unisa's wish to serve the African continent while transcending language and cultural barriers. Unisa's mission is to be a comprehensive ODeL institution that delivers excellent scholarship and research, offering quality tuition … "guided by the principles of lifelong learning, student centredness, innovation and creativity"; this includes lecturers who continuously and consistently work towards student-centredness, innovation and creativity (Unisa, 2019b). Quality teaching is essential in the landscape of higher education facing continuous changes (Hénard & Leprince-Ringuet, 2008).

Students in ODeL institutions are responsible for planning their studies. For most students, their previous learning experiences did not prepare them for the e-learning and study journey that makes for a successful Unisa student.

The advantage of ODeL is that it is an effective tool, enabling students that are unreachable because of their geographical location, financial constraints or domestic conditions to access professional development programmes at higher education institutions. ODeL removes barriers to access learning, provides flexibility of learning, is student-centred, and supports students, when constructing learning programmes. ODeL is defined as a multi-dimensional concept aimed at bridging the socio-economic, educational, communication and time divide amongst students, the institution, student academics and courseware. It focuses on creating access to education and training provisions, offers students flexible learning opportunities (Matlabe, 2010).

In ODeL institutions, lecturers have to render support to students in all student services that complement the course materials and learning resources. The primary functions of student support, essential and interdependent, are cognitive, affective and systemic (Tait, 2000).

This understanding of student support emanates from Vygotsky's constructivist theory (Cheng et al., 2008) which stipulates that knowledge is made and remade by participating in learning.

Universities depend on committed efforts of all staff members (Cant, Wiid & Machado, 2013); central to this are the lecturers who have to render unconventional service essential to students who rely on lecturers' support to guide and manage their learning experience.

Increased international competition, growing social and geographical diversity of students and the Covid-19 pandemic are some of the reasons why ODeL tuitions should be forward-looking. This compels lecturers to improve their tutoring skills and approaches to support students, further laying clear, simple communication systems in place.

Student support is a critical component of student success in ODeL. Student support is a broad term referring to the services provided to distance students, enabling them to overcome barriers to learning, and complete their studies successfully (Simpson, 2018). Central to student support is the lecturer, who should close the apertures in student support; create a balance between students' autonomy and the learning content. This balance will empower students and lead them to owning their academic journey.

Lecturers whose training and experiences are anchored in the conventional system of education are employed in CEDU and are expected to deliver leading-edge tuition with no ODeL expertise. While ODeL has varying features of historical backgrounds from country to country, the basic concepts remain the same and are comparable. The key to success lies in identifying and building on existing talents of lecturers, seeing how these talents can be transferred to the skills that are required for effective teaching and learning in ODeL institutions to guarantee student success (Simpson, 2018).

The importance for lecturers to develop synchronous communication tools cannot be over-emphasised, it is a two-way interaction which increases dialogue. These tools can assist lecturers to break the sense of isolation felt by many ODeL

students; assist lecturers to create student communities of practice, promote interaction, advance personal and cognitive participation (Falloon, 2011). Consistent interaction between lecturers and students in ODeL institutions using synchronous systems improves students' attitudes, encourages earlier completion of coursework, advances their performance in formative and summative assessments; assesses students' levels of knowledge and understanding, ensures deep, meaningful pedagogic opportunities, and builds a ubiquitous learning community (Falloon, 2011).

Lecturers in ODeL institutions should provide timeous and constructive feedback to students, assist them in structuring their learning and guide them to identify their study priorities (Falloon, 2011). They should continually change their instructional strategies and content, uphold quality interaction and dialogue which are critical components to break down students' barriers to succeed in ODeL institutions. The separation between lecturers and students lead to communication gaps, and creates a psychological space of potential misunderstandings.

In ODeL institutions, there is the emotional, psychological and geographical distance between the student and learning materials which adversely impact the transaction of teaching and learning (Tait, 2017).

Lecturers may have little or no knowledge of, or contact with the students as they prepare and deliver instructional lessons, because the didactic conversation is different from that of face-to-face institutions. Conventional lecturers have not received proper training and guidance to effectively design, develop and deliver distance learning courses; moreover, the necessary technical support is also often not available.

Lecturers in ODeL institutions do not have regular and consistent interaction with students to ensure student success. This deleteriously impacts both the lecturers and students' attitudes resulting in delays in students' completion of coursework and poor assessment results. Lack of lecturers' ODeL skills adversely impacts student motivation and engagement in their studies. Lecturers require skills to develop excellent didactic conversations with their students, to create the conversational mode necessary for successful teaching, online discussions and conferencing. These skills have not yet been acquired by conventional lecturers; hence, the deleterious impact on the transaction of teaching and learning (Tait, 2017).

In research and scholarship, having a problem has always been at the heart of the investigation process. In this case the problem is about lecturers acquiring superlative skills and strategies to equip them to successfully render efficient support to the ODeL students. There seems to have been little research – especially in the context of South Africa – on the challenges posed to lecturers in ODeL institutions including the ways of motivating them to improve their methods and delivery of learning. The question is, which skills and strategies are necessary for addressing the many challenges faced by lecturers in ODeL institutions?

Integrated theories underlying the study

Moore's transactional distance theory (Gorsky & Caspi, 2005) was used in exploring the lecturers' challenges and experiences in this study. Through transactional distance theory, an attempt was made to research the gap in the lecturer-student relationship, and the synchronous and asynchronous delivery

formats. Transactional distance theory proposes that the essential distance in ODeL institutions is transactional and not spatial or temporal. The transactional distance theory comprises three components: the **dialogue** between the lecturer and the students, the **structure** of teaching and learning which has to suit the ODeL students, and the **autonomy** of the students. The transactional distance theory was appropriate in this research because of its relevance in bridging the transactional gap in the ODeL arena and the primary objective of distance learning. For lecturers to be impactful in distance learning, they require skills which will enable them to engage with students effectively in dialogue (Mbatha & Naidoo, 2010, pp. 2-3). The transactional distance model serves as an empirical device, the means of identifying questions for research and serves as a practical instrument used to make instructional design decisions.

Through the application of the social constructivism theory (Cheng et al., 2008), emphasis is made on the importance of culture and context of what occurs in ODeL institutions. Constructivism as a paradigm posits that learning is an active, constructive process. This guide construction of new knowledge based on reality constructed through individual lecturers' activities. Cheng et al. (2008) view scaffolding as the central approach within the social constructivism construct in ODeL, and further maintain that a constructivist approach should be taken where interaction between students and lecturers would create the necessary knowledge and skills in a specific context.

The concept of dialogue is developed by teachers/lecturers and learners/students in the course of the interactions that occur when instruction is given and students respond (Letseka, Letseka & Pitsoe, 2018, p. 133) in ODeL. This dialogue is purposeful, constructive and valued by both lecturer and student. It is an educational relationship towards the improved understanding of the module content by the student.

Research methodology

The study was embedded in a transactional-constructivist paradigm. The open-ended, semi-structured interviews were structured to explain how lecturers dialogued and interacted with students, and how the modules were structured with students' autonomy in mind. The qualitative approach to study the phenomenon in-depth from the lived experiences of the participants – lecturers, including their viewpoints, was of great advantage. The methodology was exploratory, descriptive and used textual data. The purpose of the research was to identify gaps in the skills needed by lecturers in CEDU, and to extract their viewpoints about their needs to improve quality in their endeavour to support students. This provided real-life experiences of their individual challenges and needs, to give their respective students optimal support.

The research sample comprised 10 ODeL lecturers from different departments within CEDU at Unisa. Their ages varied from 32 to 60 years; there were six females and four males; their language backgrounds were – one Setswana, three IsiZulu, two Sepedi, one Tshivenda, two IsiXhosa and one Sesotho. Their academic qualifications varied from BEd, Honours to PhD, their positions were lecturer, senior lecturer and associate professor. The interviews lasted between 38 and 59 minutes. All participants were invited to participate in the research through a formal

invitation letter, following a verbal or telephonic request. The research had approval from the university's research ethics committee and followed standard informed consent protocols. Data were collected using semi-structured interviews, as well as written reflections of the CEDU lecturers. The questions were based on lecturers' experiences on how they support students in teaching and learning.

The ability to listen to each participant assisted me as a member of the teaching and learning community to strengthen my relationship. This process humanised the learning environment and built a greater sense of community within an ODeL institution. Participants highlighted issues around structural aspects such as personal relevance, organisational, communication and feedback (Falloon, 2011).

The semi-structured interviews were effectively employed to understand the lecturers' individual experiences and suggested possible solutions to the challenges they experience. The scope of the questions covered both the emotional and academic aspects of the lecturers' experiences. The academic aspect was divided into the following categories: how to motivate students to learn, to study and to write assignments.

Inductive thematic analysis (Nowell et al., 2017, pp. 2, 8) was used to analyse the data and the following themes emerged:

- Lack of formal induction on core functions;
- Dysfunctional service delivery to students;
- Radical development in technology in supporting students.

Discussion of findings

Lack of formal induction on the core functions

Findings of the study revealed that lecturers are in dire need of induction in their core function – teaching and learning. Participants cited that the institution's induction is mainly on administrative matters, instead of teaching and learning. Lecturers should be inducted in didactical skills with emphasis on commitment to teaching and learning, personal competence, creativity, innovativeness, exposure to international experience and networking in the department in which one is working, and willingness to take ownership toward academic self-management. Lecturers need skills and they can only achieve this through proper induction on their core functions if an institution truly would like to improve the throughput of student success (Cant et al., 2013).

Dysfunctional service delivery by lecturers to students

Findings of the study revealed that lecturers experience that students are very distant, they are unable to communicate effectively and efficiently. This is as a result of students' lack of access to e-learning resources, and lack of skills by lecturers to use devices and innovative Information and Communications Technology (ICT) resources at their disposal.

It is important that lecturers incline themselves to render unconventional services to students to equip them to fit the global society.

Conversely, skills and strategies referred to are: lack of innovative ICT skills, huge student numbers, non-communicating students because of lack of access to technology, inadequate ICT system, and late delivery of study material to students.

It is important that ODeL institutions have crucial amenities to ensure successful transaction of tuition (Mbatha & Naidoo, 2010, p. 1).

Radical development in technology to support students not accessible to all

Findings showed that planning programmes in ODeL in Africa should focus on an African philosophy and the practical realities of day-to-day life in Africa (Letseka, 2013, pp. 1-2). It could be assumed that when planning programmes at Unisa, the African philosophy and practical realities of the day-to-day life in Africa have not been taken into consideration. This is because students in remote rural areas and those from poorer communities cannot access the technology modes introduced to enhance student support.

Recommendations

The findings revealed the need for induction and orientation of newly appointed lecturers on the delivery of their core functions. Lecturers' service delivery to students should be greatly improved by capacitating them in all ODeL skills and strategies of teaching and learning. The institution needs to devise means to reach students in the remote villages where technology is not readily available.

The study contributed to the policy and practice of ODeL in Unisa. ODeL should be about student-centredness. Students' digital literacy is limited. This depends on the students' socio-economic status, and their residency – rural or suburban. The idea of digital literacy is a mystery to both lecturers and students, as not all lecturers are conversant with the use of digital devices. How will these very lecturers engage students online? Interventions are necessary to bring about desired results. Unisa should have an enabling value chain that supports the success of both the lecturers and the students. The transactional and knowledge creation environment should be conducive to both the lecturers and students, and have impactful value. The relationship between throughput, distance, number of students, teaching and learning should be critically considered so as to leverage opportunities, skills and strategies for best practices.

Conclusion

The scholarship of teaching and learning demands lecturers to change their negative perceptions regarding 'problems' of teaching and learning within ODeL institutions. This requires changing lecturers' mind-set and embrace the 'winds' of change. Lecturers should consider ICT problems as an opportunity to advance their knowledge of online tuition. They need to inculcate mastery goals associated with reaching high levels of proficiency, and performance goals that are associated with demonstrating competence to their students. Importantly, ODeL lecturers should be intrinsically driven by curiosity and pleasure to improve their skills and strategies to impart knowledge to their respective students. They should be determined to produce top-achieving students. Lecturers need to fully recognise their talents and develop these into strengths, apply their strengths in their roles as efficient lecturers, imparting high-quality knowledge to their students.

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Online Learning, Social Presence and Satisfaction among University Students during the COVID-19 Pandemic

Abstract

The outbreak of the coronavirus disease 2019 (COVID-19) in various countries at the end of last year has transferred traditional face-to-face teaching to online education platforms, which directly affects the quality of education. Also, students' satisfaction is extremely important in the effective implementation of online learning. Thus, the main goal of this research was to investigate the possible relationship between online learning, social presence and satisfaction with online courses among university students. The Distance Education Learning Environments Survey (DELES), the Social Presence Scale (SPRES) and the Satisfaction Scale were administered to a sample of 280 university students. The results indicated that there was a significant positive relationship between online learning, social presence and satisfaction with online courses. Also, we found a significant positive relationship between social presence, satisfaction, instructor support, student autonomy, interaction and collaboration and authentic learning, but negative correlation between social presence, satisfaction, personal relevance and active learning. The study concluded that designing types of assignments that involve collaboration among students, and instituting authentic learning experiences that align with students' interest, will improve students' social presence, online learning and students' satisfaction in online courses.

Keywords: COVID-19 pandemic, online learning, social presence, satisfaction, university students

Introduction

Never before have we witnessed educational disruption on such a large scale.
Audrey Azaulay, Director-General of UNESCO, 2020

The world has a long history of deadly pandemics (Almond & Bhashkar, 2005; Jester et al., 2019; Mansour, Rees & Reeves, 2020). A pandemic is a wide-reaching outbreak of a transmissible infectious disease, which not only increases the morbidity and mortality, but also causes significant economic, social and political disruptions. Evidence suggests that increasing globalization, urbanization and excessive exploitation of natural and environmental resources have increased the likelihood of a pandemic (Gronseth, 2018). One of the deadliest pandemics of the current century, the coronavirus pandemic (COVID-19) is an ongoing disease and it is spreading rapidly across the globe. The first case of COVID-19 was identified in Wuhan, Hubei, China in December 2019, and later on March 11, 2020, the World Health Organization (WHO) declared COVID-19 as a pandemic (World Health Organization, 2020). The consequences of a pandemic can be extremely difficult to control for many industries of the world.

The global academic calendar has been thrown into a state of disarray by the coronavirus outbreak. Most schools, from primary schools to universities, have shut down their doors and students have returned home to their parents and together they self-quarantined (UNESCO, 2020). Convocations and graduations have been cancelled, and classes have been cancelled, some examinations have been cancelled, university research programs have been postponed. Most higher education institutions and universities provide online courses for their students within and off campuses. At the same time, faculty and staff members are learning how to use online learning platforms. Previously, they were using only face-to-face teaching. However, the shift to an online mode has raised many queries in regard to the quality of education – specifically quality of teaching and learning.

Learning shift toward online learning

According to UNESCO (2020), over 1.5 billion learners in 165 countries are affected by school closures due to COVID-19. This translates to 87% of the world's student population. The online system of education is viewed as relatively new, according to research, in the future, it will just be as effective as school-based methods (Murphy, 2020). Also, education industries are adopting the available technologies such as digital video conference platforms like Zoom, Microsoft platform, WebEx Blackboard and Google Classroom. Therefore, this will be enhancing online learning globally.

In response to the outbreak of the epidemic, the online has become a necessary way to maintain a normal teaching order. However, during a period of an epidemic, online education is conducted mainly in the form of class-based teaching by professors of their own universities, which is an extension of the original offline education. So, online learning has become an integral part of higher education worldwide. Many university leaders discuss not only about the usability of online learning, but also about its connectivity, mobility and interactivity (Bao, 2020). Students participate in chat rooms in real time or asynchronously by posting in newsletters or forums. Also, they might offer opportunities to engage fellow students and teachers within a deeper dialogue and insightful questions as a technique. On the other side, online learning has the effect of communication since virtual communication differs from face-to-face communication. Online learning requires new approaches to the organization of classes, individual assignments, and self-education approach.

Social presence in online learning communities

Short, Williams and Christie (1976) identified social presence as the level of salience of one person's communication with other individuals and consequential salience of the interpersonal relationships. Tu and Mcisaac (2002) defined social presence as the extent of feeling, perception, and reaction that a learner experiences in an online environment. They found that three dimensions of social presence in distance learning environment are very important: interactivity, social context, and online communication. While interactivity includes distance learners' communication styles and engaged activities in the courses, social context encompassed privacy, task orientation, social relationships, and social processes.

Interactive communication tools such as discussion boards are examples of online communication tools.

Social presence is important in online learning, because many students need to feel a connection with others if they can share ideas, exchange views and work together. So, in this pandemic time, students in an online community can act to create or build social presence for themselves and others.

Satisfaction in online education

The construct interaction plays an important role in both face-to-face and online learning. In fact, many studies have found that both quantity and quality of student interactions are highly correlated with student satisfaction in almost any learning environment (Pei & Wu, 2019).

Satisfaction is defined as a person's attitude or feelings associated with various factors that affect a particular situation. Oliver (1999) defined student satisfaction as the total individual subjective evaluation and experience of a service, and the gap between what was expected and was received from the server providers. Education is not solely about acquiring knowledge and skills, but also about individual advancement through personal growth and social development.

Several factors contribute to students' satisfaction in an online learning environment, which may include: teacher, student, course, system design, technology and environmental aspects. Additionally, satisfaction is greatly influenced by peer interaction, student-faculty interaction and communication with professors.

At this moment we are in the midst of a worldwide pandemic, with cities and even entire countries shutting down. The government of each country decided to restrict personal movements, public events, and business activities of their people. The pandemic led to disruption in teaching and learning activities globally (Kaur et al., 2020). The transformation from traditional learning to complete web-based learning, however presents several challenges to the academic staff as well as the students.

Students' technological possibilities and professors' characteristics along with course design significantly determine the students' satisfaction. Thus, a need emerges to study the relationship between online learning, social presence and satisfaction with online courses among university students during the coronavirus disease (COVID-19).

Research methods

Participants

The research was conducted on a group of 280 university students from 20 to 23 years of age. The median age of the students was 20.62. Of all participants, 214 were female (76.42%) and 66 were male students (23.58%). The study group that was a subject of the research included students who studied medical sciences and psychology at the University of Tetova.

Instruments

With the scope of the study, the following data collection tools were used among students: the Distance Educational Learning Environments Survey (DELES), the Social Presence Scale (SPRES) and the Satisfaction Scale.

Distance Educational Learning Environments Survey (DELES)

The Distance Educational Learning Environments Survey – DELES (Walker & Fraser, 2005) is a self-reporting Likert-type survey of 34 items with five answer options from "strongly disagree=1" to "strongly agree=5". The constructs in this survey were: instructor support, student interaction and collaboration, personal relevance, authentic learning, active learning, and student autonomy. In this study, Cronbach's alpha coefficient was used in order to test the internal consistency of the questionnaire data, whose coefficient was between 0 and 1. In this questionnaire, six Cronbach's alpha coefficients were all higher than .7, indicating that the internal reliability of each first-level indicator of the questionnaire was high.

Social Presence Scale (SPRES)

The Social Presence Scale (SPRES) developed by Cobb (2009) was used in order to measure the general social relationship and interactive communication level among students. The scale was composed of 14 items. It is a five-point Likert-type scale. According to the sums of the scores, the total score ranges from 14 to 70, where higher scores prove higher level of social presence. Cronbach's alpha coefficient for internal consistence was .772.

Satisfaction Scale

The Satisfaction Scale developed by Richardson and Swan (2003) was a 7-item questionnaire, a Likert-type response format from 1 to 5. The higher scores indicated higher rate of satisfaction. The internal coefficient of consistence (Cronbach's Alpha) was .816 for this study.

Data procedure and data analysis

A total of 280 students from the Faculty of Medical Sciences and the Department of Psychology within the University of Tetova participated in this study. Students were invited via email, with information on the purpose of the study and the time it would take to complete the questionnaires. They were also told that their data and information would be treated as confidential, that their participation was voluntary, and they could withdraw at any time. It also contained a web link to the online survey form created by using Google Form. The form was made accessible to the students from April 16 to June 15, 2020. The data was exported to Microsoft Excel 2018 and was analyzed by using SPSS (Statistical Package for Social Sciences) version 20 for Windows.

Results

In our study we observed that the median rate of the construct online learning was 124.50, while the median rate of social presence was 36.00 and of satisfaction it was 21.00. There was a positive relationship between the level of online learning, social presence and satisfaction with online courses ($F_{277,1}$=46.201, sig=.008, p<.01).

Instructor support (Median=24.25), student autonomy (Median=22.50), and student interaction and collaboration (Median=22.00) received the highest scores for online learning. The constructs authentic learning (Median=20.00), personal relevance (Median=18.50), and active learning (Median=16.50) earned the lowest score from the participants.

Social presence was one construct composed of 14 items. The items that received the highest scores were "Instructor facilitated discussions in the course" (Median=4.50), "I felt comfortable participating in the course discussion" (Median=4.00), and "The instructor created a feeling of an online community" (Median=3.50), while the item that earned the lowest score was "Messages in the online course were impersonal" (Median=2.00).

Also students' satisfaction in online courses was one construct with seven items. The items that earned the highest score were "I am satisfied with this program" (Median=4.50) and "I enjoy distance learning" (Median=4.00), while the item that earned the lowest score was "I prefer distance education" (Median=2.50).

The results of the Spearmen correlation indicated that there was a positive and significant relationship between social presence and instructor support (r_s=.087, p<.001), student autonomy (r_s=.032, p<.01), student interaction and collaboration (r_s=.064, p<.001), and authentic learning (r_s=.450, p<.005), however negative correlation between social presence and personal relevance (r_s=-.282, p>.001), and active learning (r_s=-.346, p>.001). Regarding the relationship between satisfaction with online courses and online learning subscales, the following results are presented: satisfaction and instructor support (r_s=.045, p<.001), student autonomy (r_s=.689, p<.01), student interaction and collaboration (r_s=.789, p<.001), authentic learning (r_s=.060, p<.05), personal relevance (r_s=-.542, p>.001), and active learning (r_s=-.265, p>.001).

Discussion

The current state of alarm due to the COVID-19 pandemic has led to abrupt changes in the education system of university students: a shift from traditional to online learning. The use of information technology in the current situation can be a solution for educational institutions and students to continue and improve the learning process with acquisition of new skills. Based on the results of our study, it is clear that students preferred to develop relationships with their professors and other students and simultaneously maintain their individual identity in online courses. They stated that participating in online learning provides them the opportunity to participate in discussions. The obtained results are similar to the results obtained by other researchers (Killian, 2020; Means & Neisler, 2020). The students also mentioned that the emotional and psychological support they received from their professors made it easier for them to get through this period. During the online classes and online learning, students' level of contact and cooperation with their professors increased. Majority of the students feel encouraged to participate while taking courses online, their productivity and the sense of autonomy have increased. Hence, professors try their best to keep in touch with their students during online office hours, as well as reach out to each student in their class individually if there is a sudden decrease in performance.

Also, we found that students were satisfied with their online courses during the COVID-19 pandemic. Students do not feel that they are more isolated in the virtual learning environment. Online learning was effective and influential in increasing their level of motivation for lessons and treated it as a good opportunity to help students become more organized (Quacquarelli, 2020).

After COVID-19, it is necessary for higher education institutions to focus on improving online learning to integrate technology into the teaching environment, and to contribute to the ongoing development of academic staff with the larger goal of enhancing the quality of learning, through innovative approaches that aim to motivate and stimulate learning (National Academies of Sciences, Engineering, and Medicine, 2020).

Concluding remarks

Colleges, instructors and students had to change the way they collaborate in spring 2020. There was no time to build online courses using research-based practices for effective learning online. Stakeholders and the management of higher education institutions have no other option, but to make use of internet technology, thus online learning for the continuation of academic activities across all schools worldwide. Therefore, based on the COVID-19 situation, the present study aimed an exploring online learning, social presence and students' satisfaction with online education platforms in the Republic of North Macedonia. COVID-19 has significant impact on university education and pushes transformation of the structure of university education in the Republic of North Macedonia. It becomes necessary to modernize the teaching methods in universities. And it was the pandemic that gave such an impetus for rapid and effective transformation in the higher education system of Macedonia.

The findings from the study suggest that the implementation of online learning programs was a very great idea as the majority of the sampled students supported the initiative. Moreover, we found that the social presence had the largest effect on students' satisfaction with online learning. The high degree of autonomy and interaction among students was considered to be a strong positive component of online learning by respondents. Autonomy and interaction among students can be capitalized by the instructor/professor to provide a richer and more robust educational experience.

This study only examines the satisfaction of online learning courses from the perspective of students. In fact, the opinions of professors and parents are also most important. Therefore, future studies can comprehensively analyze the satisfaction with online education platforms from the perspective of multiple subjects. The university's management should provide constant monitoring of the satisfaction of students and lecturers with the online organization for the accumulation of statistical data in the dynamics.

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Snježana Dobrota

Multicultural Music Education in the Context of Higher Education

Abstract

The paper has explored the influence of age / year of study, high school education, additional music education, engaging in music in leisure time and frequency of going to the theatre and classical music concerts on students' world music preferences, and the relationship between world music preferences and familiarity of music. The research was conducted on a sample of students from different faculties of the University of Split and the University of Zagreb, using a questionnaire composed of two parts: *The Sociodemographic Questionnaire* and *The Music Preferences Questionnaire*. The results do not confirm the influence of the type of high school education or age / year of study on students' world music preferences. Furthermore, the influence of additional music education, engaging in music activities in leisure time or the frequency of going to the theatre / classical music concerts on students' world music preferences has not been confirmed. The existence of a relationship between familiarity of music and students' world music preferences has been confirmed. The obtained results have significant implications for music pedagogy, especially in the context of higher education.

Keywords: music pedagogy, multicultural music education, world music preferences, higher education

Introduction

The term culture includes everything that the people acquire from the societies and transmit to the subsequent generation (Clifford, 1988). The term multiculturalism refers to a pluralism of different cultures and cultural aspects and the interaction among them. Thanks to intensive migrations and processes of globalization in modern society, the need for multicultural education at all levels of the educational vertical is becoming increasingly pronounced. Hall (1997) defines multicultural education as humanistic concept based on the strength of diversity, human rights, social justice, and alternative lifestyles for all people, and Baker (1979) defines it as an approach to teaching and learning based upon democratic values that foster cultural pluralism. According to Nieto (2009), multicultural education is a process of comprehensive school reform and basic education for all students. It challenges and rejects racism and other forms of discrimination in schools and society while it accepts and affirms the pluralism that students, their communities, and teachers reflect.

Music is an effective medium for expressing and conveying culture and for understanding different world cultures. Campbell (1994) defines multicultural music education as "the program focusing on music representing two or more of people integrated due to a nation foundation of an ethnic origin" (Campbell, 1994, p. 73).

There are different rationales for the inclusion of world music in school, such as musical, social, educational, and demographic. The *aesthetic approach* to world

music education focuses on the study of the musical elements of diverse music genres and aim at improving students' musical knowledge and abilities (Papageorgiou & Koutrouba, 2014). On the other hand, the *sociocultural approach* studies world music in conjunction with its sociocultural and historical background (Papageorgiou & Koutrouba, 2014).

Music education in primary and secondary schools in Croatia is conducted according to the *Curriculum of Music education for primary schools and for grammar schools in the Republic of Croatia* (MSE, 2019). This document defines the school subject purpose and description, educational goals of learning and teaching, the structure – domains of the subject curriculum (i.e., Listening to music and familiarization with music, Expressing through and with music, Music in a context), educational outcomes, contents, and levels of acquisition by grades and domains, connection with other school subjects and interdisciplinary topics, the subject learning and teaching, and the evaluation of the acquisition of educational outcomes.

The paper relates to the subject purpose and description lists the principles on which the above-mentioned Curriculum is based: psychological principle, cultural-aesthetic principle, synchronicity principle, and interculturality principle. According to the interculturality principle, through learning about their own culture and world music, students develop an awareness of different but equally valuable individuals, peoples, cultures, religions, and customs.

Among the educational goals of learning and teaching, it is stated that students get acquainted with music as art through quality and representative pieces of the music of different origins, styles and types, including *world music*. Furthermore, one of the goals is to raise awareness of the value of regional, national, and European cultural heritage in the context of world culture and to develop cultural understanding and intercultural competence through building relationships with one's own culture and an open approach to other music cultures.

The chances to learn about different music cultures and traditions exist in all three domains, especially in the domain *Music in a context*, which, among other things, directs students to discover the value of the rich regional, national, and global music and cultural heritage.

An analysis of the *Curriculum of Music education for primary schools and for grammar schools in the Republic of Croatia* (MSE, 2019) reveals that primary and secondary school students have the chance to learn about different music traditions and develop tolerance and openness to different cultures and peoples.

Research aim, research problems and hypotheses

The research aim is to examine the influence of age / year of study, completed high school education, additional music education, engaging in music activities in leisure time, and the frequency of going to the theater / classical music concerts on students' *world music* preferences and the relationship between familiarity of music fragments and preferences for them.

In accordance with the formulated research objective, the following research problems were defined:

1. Whether the age / year of study and completed high school education influences students' *world music* preferences?

2. Whether additional music education and engaging in music in leisure time influences students' *world music* preferences?
3. Whether frequency of going to the theater / classical music concerts influences students' *world music* preferences?
4. Whether there is a connection between familiarity of music fragments and preferences for them?

Based on the defined research objective and research problem, the following hypotheses were defined:

- **H1** Students who finished grammar schools and students at a higher university study level, in relation to students attending vocational schools and students at a lower university study level, show greater *world music* preferences.
- **H2** Students with additional music education and students who engage in music activities in their leisure time, compared to students without music education and students who do not engage in music activities in their leisure time, show greater *world music* preferences.
- **H3** Students who often and sometimes go to the theater / classical music concerts, compared to students who never go to the theater / classical music concerts, show greater *world music* preferences.
- **H4** Students show greater preferences for the familiar over unfamiliar music fragments.

Research methods

Participants

The research was conducted using an online survey for a sample of 202 participants including first, second, third, fourth, and fifth-year students from different faculties at the University of Split and the University of Zagreb. First, second, and third-year students form one group (N = 73), and fourth and fifth-year students form another group (N = 129).

Instruments and research procedure

A questionnaire was constructed for the purpose of the research. In the first part, *The General Data Questionnaire*, sociodemographic data on participants were collected (faculty, study group, finished high school, additional music education, engagement in music activities in leisure time, frequency of visits to the theater / art music concerts). The second part is *The Music Preferences Questionnaire*. The task of the participants was to listen to a piece of music and assess on a Likert-type scale, ranging from one to five (1 = I don't like it at all; 5 = I really like it), how much they liked a certain music fragment and how much they were familiar with it.

A compact disc was made containing ten music fragments of children's *world music* (Hartmut E. Höfele & Freunde: Jibuli Kinderlieder Spiele und Tänze aus aller Welt), lasting for about one minute each. The CD was constructed exclusively for the purposes of this research, and the criteria for the selection of music fragments were the defined research problems.

Regarding the average degree of the music fragments preferences, the participants rated the song *Lelola* (Spain & South America) with the highest marks and the song *Rasa sayang eh* (Malaysia) with the lowest.

Results

H1 *Students who finished grammar schools and students at a higher university study level, in relation to students attending vocational schools and students at a lower university study level, show greater world music preferences.*

In order to explore whether students' *world music* preferences differ according to the type of completed high school education and age / year of study, a two-way variance analysis was conducted. The results show no difference in students' *world music* preferences with regard to the type of finished high school ($F = 2.15$; $df = 1, 198$; $p = 0.14$) and with regard to age / year of study ($F = 3.63$; $df = 1, 198$; $p = 0.06$). No significant interaction effect of finished high school and age / year of study on *world music* preferences was found ($F = 2.31$; $df = 1, 198$; $p = 0.13$), which made us reject the set hypothesis.

H2 *Students with additional music education and students who engage in music activities in their leisure time, compared to students without music education and students who do not engage in music activities in their leisure time, show greater world music preferences.*

In order to explore whether students' *world music* preferences differ with regard to additional music education and engaging in music activities in leisure time, a two-way variance analysis was again conducted. The results showed no difference in students' *world music* preferences with regard to additional music education ($F = 0.34$; $df = 1, 198$; $p = 0.56$) and engaging in music activities in leisure time ($F = 1.03$; $df = 1, 198$; $p = 0.31$). No significant interaction effect of additional music education and engaging in music activities in leisure time on *world music* preferences was found ($F = 3.74$; $df = 1, 198$; $p = 0.05$). This made us reject the hypothesis.

H3 *Students who often and sometimes go to the theater / concerts of classical music, compared to students who never go to the theater / concerts of classical music, show greater world music preferences.*

A variance analysis was conducted to explore whether students' *world music* preferences differ in terms of the frequency of going to the theater / classical music concerts. The results show that there are no differences in students' musical preferences with regard to the frequency of visits to the theater / classical music concerts ($F (2, 199) = 3.52$; $p = 0.03$). This made us reject the hypothesis.

H4 *Students show greater preferences for the familiar over unfamiliar music fragments.*

To determine whether being familiar with the music fragments affects students' preferences, correlations between familiarity of music and musical preferences were calculated. The existence of such correlations was observed for all music samples, which made us accept the final hypothesis.

Discussion

We have rejected the first hypothesis that students who finished grammar schools and students at a higher university study level, in relation to students attending vocational schools and students at a lower university study level, show greater world music preferences. The results obtained are not in line with the results of Dobrota (2016), according to which senior students, compared to younger students, show greater *world music* preferences. Furthermore, Dobrota and Reić Ercegovac (2017) confirm no existence of the difference in students' musical preferences concerning the type of high school. On the other hand, Howard (2018) conducted a research on fifth grade primary school students, and confirmed that by familiarizing themselves with the music of different cultures, students develop musical abilities, form their musical preferences, but also come to understand different historical and cultural processes. Similar results were obtained by Kim and Yoon (2016), but on a sample of the university student population.

In order to explore whether students' *world music* preferences differ with regard to additional music education and engaging in music activities in leisure time, we assumed that additional music education would contribute to an increase in musical preferences in general, including *world music* preferences, but this has not been confirmed. The obtained results are not in line with the results of Gürgen (2016), who emphasizes the significant role of music education in the formation of students' musical preferences.

We have also rejected the hypothesis that students who often and sometimes go to the theater / concerts of classical music, compared to students who never go to the theater / concerts of classical music, show greater world music preferences. Dobrota and Reić Ercegovac (2017) examined the relationship between musical preferences, on the one hand, and music education, non-formal and informal influences, and familiarity of music, on the other hand. They noticed that participants who often go to the theater / classical music concerts show greater preferences for jazz and world music.

We have concluded that familiarity of music affects students' preferences, and the obtained results are consistent with the results of numerous studies confirming that familiarity of music is a significant factor influencing the formation of musical preferences (Fung, 1996; Teo, Hargreaves & Lee, 2008).

Conclusion

The results of this research did not confirm the influence of the type of completed secondary education or age / year of study on students' *world music* preferences. Furthermore, additional music education, engaging in music activities in leisure time and the frequency of going to the theater / classical music concerts did not prove to be significant predictors of students' *world music* preferences. However, it was confirmed that students show higher preferences for the familiar compared to unfamiliar music fragments.

The obtained results have significant musical and pedagogical implications for teaching music in the entire educational vertical. It is evident that multicultural music education should start as early as possible, but also that such education has a positive impact on the development of intercultural attitudes and tolerance for

different cultures at all stages of life. Therefore, it is necessary to include traditional music and various *world music* in preschools, primary and secondary schools, but also in higher education, thus making students familiar with various music cultures, but also spreading openness and tolerance towards members of different cultures.

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Part 5
Law and Education

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Covid-19, a Rumour That Became Reality: The Impact on Business Education Students of Using Online Learning

Abstract

This work is part of an ongoing research project and literature review on the role of art in education and the interrelationships between art, creativity and online learning (focused on Business Education students from a university in Mexico). This research looks at the experiences of international students studying a business programme in the UK of the move to online teaching and learning that was suddenly imposed by the Covid-19 pandemic. The first part shares the issues and challenges of the Covid-19 pandemic on international students studying in the UK based universities that were identified in a seminar organised by FLS and QC Media Team. The second part draws on a guest lecture delivered to Business Education students from a university in Mexico using online learning, which sought to ascertain their experiences and the support needed during the current Covid-19 pandemic. The methodology used was a focus group with the students, using a set questions focused on their experience of engaging in online teaching and learning, compared to traditional classroom-based, face-to-face learning. The findings of the research confirm that the move to online teaching and learning has had both negative and positive impacts on the Mexico students, in relation to creativity, arts and painting practice. Tellingly, both groups of students – from the first stage and second stages of the research – said they wanted to go back to classroom based face-to-face teaching and learning. All of the students indicated that they wanted more support from their teachers and their institutions.

Keywords: Covid-19 pandemic, students, teachers, online learning, classroom contact, creativity, arts and painting

Introduction

The Covid-19 pandemic has affected many institutions globally and society at large and it is obvious that the impact will take time for normality of life again. The World Health Organisation (WHO) has defined Covid-19 as Corona Virus, a disease caused by the new Corona Virus called SARS-Cov-2, the symptoms of which include, coughing, breathing problems, fatigues, loss of taste and smell, which can take up to 14 days to show the signs (Baum & Hai, 2020). Corona virus was first reported as a cluster in Wuhan, People's Republic of China on 31st December 2019 and became uncontrollable from then to date. Due to the speed with which the virus spreads, the WHO reported the threat of a Pandemic (WHO, 2020) and to prevent

the spread of the disease, individuals were asked by the government to maintain social distancing to limit the rate of transmission of the virus.

The rumour became a reality when some of the students from South East Asia who were studying in London could be seen wearing masks walking on the streets and in some cases to the classroom. People from the UK had not understood what it was all about until January 2020, when they began to realise that there was a serious virus that was spreading rapidly all over the globe. As the virus is generally spread through the respiratory droplets, face mask and hand sanitizers were recommended to help protect people from catching and spreading the virus.

The virus has caused tremendous damage to businesses, education institutions, and students as we altered the way we delivered teaching and learning using online support. In the UK, the spread of the disease became very serious with thousands of deaths announced on daily basis. The UK borders, airports and other means of transport were still in operation with more people coming into the UK. Globally there was serious panic as Covid-19 spread fast throughout Italy, the United States, France and the UK, with a high death rate, resulting in lockdowns that led to the move to online teaching and learning. This affected students around the world, including the Business Education students in the University of Guadalajara in Mexico who were involved in this research.

The purpose of this paper is to share the experiences of these Business Education students from Mexico. It arose from a guest lecture as part of the research project, working with Claudio Rafael Vásquez-Martínez analysing his work based on creative arts and painting (see Achinewhu-Nworgu (2017) for more on this work). The paper explores the challenges and impact of Covid-19 on Business Education students in a university in Mexico and evaluates the impact of using online delivery on painting and creativity.

Objectives

- Examine the challenges facing students in general in embracing online teaching and learning and the impact on their creativity, arts and painting.
- Share students experience of the difficulties faced in coping with the virtual learning delivery.
- Explore more effective measures to support students to embrace online teaching and learning at this tough time in creative arts, painting and creativity.
- Suggest strategies to support students to make the best use of virtual learning in creativity, arts and painting.

Literature

The challenges imposed by emergent of Covid-19, has had a drastic effect on businesses, education, the National Health Service and students at large. The pandemic has had a serious impact on businesses all over the world, resulting from government actions imposing strict policies and restrictions that all businesses have to comply with (Nicola et al., 2020). Covid-19 has resulted in uncertainty, hardship and increasing high unemployment due to business closures and lockdown restrictions. The Covid-19 pandemic has led to a world financial crisis pushing most

of the industries to closure (Goolsbee & Syverson, 2020), although with some companies such as Amazon have benefitted. In the area of the health sector, the pandemic has resulted in increased workload with increased patients admitted with Covid-19 which has drastically affected the sector to cope with it all (Johnson et al., 2020). COVID-19 has brought about many changes to our society. In education, teachers and students have had to embrace a switch to online teaching and learning (Achinewhu-Nworgu, 2020). In addition, the lockdown has led to teaching and learning from home resulting in isolation, leading to big challenges for the students and their teachers at large, and the obvious challenges of a sudden embracing of technology for online teaching and learning. The pandemic has also had a big impact on the Business Education students in their creativity, arts, painting and drawing, comprising positive and negative impacts. Some other psychological impacts identified in the first stage of this work carried out with the international students studying in the UK, includes: home distancing and online studying (Nguyen, 2020); financial difficulties resulting from job losses (Mao et al., 2020); embracing virtual learning/technical problems; loss of friends and families, isolation, stress, home sickness, panic and inability to cope with coursework due to worries and stresses of the unknown (Achinewhu-Nworgu, 2020).

The Covid-19 pandemic has kept a mark of uncertainty and unrest for global businesses, resulting in a plan of actions (Tison et al., 2020). The lockdown has also imposed serious challenges for organisations of which education institutions were highly affected, not least in the areas of creativity, painting and arts for the Business Education students. The panic of pandemic got all confused and stuck with the lockdown, resulting in institutions having to embrace online teaching – as failure to comply with the signed contracts with students, may result in recovery of fees, leading to more financial loss by the universities in the UK and around the world (Achinewhu-Nworgu, 2020). The impact extended to international students in the UK. Evans (2011) reports that "UK universities educate about 2.5 million students annually, with a 28% increase in student numbers overall in the past 10 years". These data suggests that studying in the UK is a popular choice for international students. Most international students come to study in the UK for the following reasons: gain practical experiences, new skills; opportunity to study in a multi-ethnic and multi-cultural setting; pursuing courses of study in English; besides, English is often referred to as 'the language of business', and if business is to drive economic growth, then it is vital for overseas students to have 'English' qualifications and value and quality attached to UK qualifications (Achinewhu-Nworgu, Shotte & Nworgu, 2012).

The first stage of the work on challenges of Covid-19 centred around sharing the international students' comments on challenges they have faced in trying to embrace the online teaching and learning resulting from the emergent corona virus. It is on that notion that the stage two work came about to extend, compare and share the experiences of the Business Education students from one of the universities in Mexico. The review of the literature has provided an ample knowledge on the nature of the problems students are facing embracing online teaching and learning, mainly on creativity, arts, painting and drawing.

Methodology

The approach to this research has utilised a mixed methods approach – the acquisition, analysis and combination of qualitative and quantitative data in a single or multiphase study that allows the researcher to gather rich data from multiple perspectives and paradigms (Creswell, 2003). The work aimed to involve a group of more than 5 students, however with the language barriers, most students being taught in the native language, the study was able to engage 5 English speaking students as participants with the second stage of the research. The data gathered was sufficient for this small-scale research and the information collected was rich enough to inform an opinion about the positive and negative challenges faced by the students. The research aim was to examine the difference in perceptions of the students on the impact of online learning resulting from Covid-19 pandemic, and the impact on their creativity, arts and painting. Data was collected from an online guest lecture using zoom and a discussion using open questionnaires where each student was asked the same questions. The approach adopted was very relevant at the present time and also considering the distance in travelling to Mexico for the guest lecture, gathering the information from the guest lecture using zoom was very useful, less costly, and rich data was gathered as summarised below.

Students' comments

The section presents a selection of the comments from the students based on their experience using online learning compared to their experiences of face-to-face classroom contact. The comments are presented using coding for confidentiality and protection of identity, in compliance to research ethics and code of practice.

> *The lockdown has led to us learning online. It is good in a way, but also has its negatives. On the question regarding the online teaching and learning and the link to creativity, arts and painting, it has had a positive and negative impact for me. On the positive side, I still do my painting and drawing online as it has not made any difference from what I already know. It has enhanced my knowledge in drawing and being more creative, learning new ways of doing things differently through digital technology, a gain from the pandemic era in my experience embracing an online learning. On the negatives, I have not seen my teacher; it will be nice to see who is teaching you face-to-face as you learn more on face-to-face contact. I am use to face-to-face teaching; online can be stressful and not something I would like for a long time.* (M1)

> *I am not a digital technology learner, although we have to use IT in accessing course materials for completing course work and submitting online. It is not the same as what we are presented with now. It is not the same as sitting online for lessons, sometimes with problem connecting to the system and when you do, may not know who is talking to you and some teachers or students would not have their cameras switched on. I hear my colleagues' voice but don't see them on a face-to-face, compared to the classroom meetings. I will suggest that students are given more support at the current time in accessing course materials and some of the technical IT issues to be more supportive.* (M2)

> *The current pandemic has also brought good things except for the number of deaths all over the world. It has exposed the students and their teachers to a new learning environment and helped to develop our skills more using virtual team and all*

available means of technology to improve teaching and learning, which I may not have had the opportunity to access. (M3)

I cannot see any creativity in my arts and painting at present because, I have not attempted to do this online. I would prefer the normal classroom artwork to see what I am doing with my teacher on face-to-face contact. The current teaching online has not offered much on this. However, I still want to go back to our classroom face-to-face learning. We need our teachers in the classroom as usual and it helps us learn more when we interact face-to-face with teachers and colleagues. I hope it comes to an end soon to be back to the classroom learning. (M4)

The lockdown has presented a lonely life working on your own compared to working with the colleagues. I became worse living alone. I have not seen the people I am studying with or my teachers than hearing their voices. It will be nice to meet my colleagues in the class to learn together. Learning is about working with your colleagues and it can be very demanding and frustrating working on your own. I am not definitely finding it comfortable and enjoyable. However, our teachers are doing their best to teach us online, but I still prefer the classroom learning on face-to-face. (M5)

The findings of the mini research seem similar to the first group of the international students who shared their experiences using an online learning imposed on them by the Covid-19 pandemic, for instance sharing two of the comments from the stage one of this work:

The lockdown due to Covid-19 has not done much good at all. It was unexpected and the sudden embracing of an online teaching which is not a joke, more so, when you have a whole day class from 9-5pm, it can be daunting, sitting in front of your laptop day in day out. I have developed swelling feet due to lack of exercises as most gyms are shutdown. It is very stressful for me to cope with it all. I feel like dropping out to be quite honest, but don't want to waste the fees. (P8)

I see myself unlucky coming for the first time in the UK and to face this horrible period. I have not used computer to learn except for searching for information. Due to the law prohibiting free movement to stop the spread of the virus and with compulsory social distancing, I am receiving lesson online. The question I ask myself is: Why did I come here to study? My Mum calls every single day to check on me and sometimes I cry when she drops the phone. It is a tough life and not sure if we will ever get back to our normal life again. The worst is isolation, you are alone and alone. It is not easy. (P4)

Discussion

The first stage of the research was presented in October 2020 at the FLS and QC Media conference UK and it focused on the international students studying in the UK, sharing their experiences embracing online teaching and learning. In the current stage two of this work, which focused on students from a university in Mexico derived from a guest lecture presented as part of a research project organised by Prof Claudio Rafael Vásquez-Martínez, the majority of the students seem to be receiving their lessons online with their teachers and have benefited from their learning online, with limitations compared to the face-to-face classroom teaching. When asked how they have used the online learning for creativity, artwork and painting, the majority admitted that it is not same using online learning compared to their classroom face-to-face. Although, one of the students said they had added new knowledge and skills

from online learning in creative arts, painting and drawings, which has enhanced his learning, most of the students would prefer doing their arts' work more in the classroom than using digital technology to draw and paint. Others have experienced some technical issues in logging into their online classrooms, not hearing their teachers or colleagues in some cases, whereas others have had some good experiences working from home, saying that it is easy working from home in saving transport; besides, it is all about embracing what works now to learn, which they have no choice or alternative to what they want such as the face-to-face classroom contact. The findings indicate that most of the students have had difficulties in coping with the virtual learning delivery, particularly the international students coming to the UK to study for the first time compared to the students from Mexico. All the students have emphasised the urgent need to go back to their face-to-face classroom teaching and learning which works for them better. The worries to them are when should this be over for a normal life again?

Conclusion

The research draws from the previous work on impact of Covid-19 on international students studying in the UK and shares the comments of the Business Education students from a university in Mexico on the positives and negative challenges faced in their online learning imposed by the Covid-19 pandemic and the impact on their creativity, arts and painting, derived from a guest lecture organised by Prof Claudio Rafael Vásquez-Martínez as part of his research project on creativity, arts, drawing and painting. The work has the literature relevant to the nature of online learning imposed by Covid-19. The impact of Covid-19 has led to: home distancing and online studying (Nguyen, 2020), financial difficulties resulting from job losses (Mao et al., 2020), and embracing virtual learning with technical problems (Achinewhu-Nworgu, 2020).

Based on the findings from stage one of this current work, the Covid-19 pandemic has significantly altered teaching and learning practices with the move from face-to-face teaching to online delivery. The lockdown imposed by the government to reduce the spread of the virus (Nicola et al., 2020) still remains a big worry for all. The impact of the Covid-19 pandemic is not limited to the students or education sector alone; it impacts on the world's finances and businesses (Goolsbee & Syverson, 2020). The 2020 pandemic has resulted in a plan of actions (Tison et al., 2020) in which all have had to adjust: it is embracing the digital world for service delivery of which, all institutions over the globe are looking for alternatives to deliver their services. For the education sector, the priority is about effective teaching and learning and to make the most use of the software for online delivery, whilst ensuring that students are supported, practically, academically, and pastorally, to successfully adapt to this new model of teaching and learning.

Recommendation

The work recommends more support for all students and their teachers in relation to effectively managing online teaching and learning, in terms of welfare, wellbeing, health and safety. Universities and colleges need to provide the training and development opportunities to support their students and staff to adapt to the new

reality and cope with it all. The work is open to further research with larger groups and to extend it to other universities in Europe, and in Africa as well, to explore the difference in students' perception of the impact of virtual learning era imposed by the Covid-19 pandemic.

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How Has the COVID-19 Pandemic Affected Nigerian Women Entrepreneurs in the UK?

Abstract

The impact of the COVID-19 pandemic, and the policy of lockdowns, on business in general, and certain sectors of the economy, has been widely discussed during the last year. Less is known, however, about the impact on specific groups of economic actors within the UK economy. This small-scale research project explores the impact that the pandemic and lockdown has had on Nigerian women entrepreneurs with enterprises in the UK. The paper considers the context in which these women were operating before the pandemic, the additional challenges created by lockdown and the disruption to many of their businesses, and the impact it has had on these women's lives and their businesses. It concludes that more business support is needed for this highly resilient and versatile group of female entrepreneurs during this uniquely challenging period.

Keywords: women entrepreneurs, motivation, embracing change, virtual work practices, crisis of COVID-19, ethnicity

Introduction

The purpose of this paper is to examine the impact of the current changes and how African women in the UK are motivated to embrace changes in business practices to sustain their businesses, regardless of the damage caused by the current pandemic. The women referred to here are Nigerian female entrepreneurs who are based permanently in the UK managing their own businesses, ranging from hair dressing, media, care homes, recruitment, restaurants and any registered UK form of recognised businesses. The approach for the data collection is derived from coaching work with female entrepreneurs, on business planning and management, also an entrepreneur, a media and publicist for celebrities. The paper highlights some of the challenges currently impacting on female entrepreneurs and their motivation to use the virtual aides working from home to sustain their businesses.

Background

Entrepreneurial culture and motivation

Drawing from the concepts of entrepreneur culture, seen as "a set of values, beliefs and attitudes commonly held by society which supports the notion that an entrepreneurship is desirable and supports the search for effective entrepreneurial behaviour" (Gibbs, 1996, in Ajekwe, 2017), therefore the success of every female entrepreneur depends on balancing the culture of the local customers, global and national (Durowoju, 2014), and this can have both negative and positive impacts. Schumpeter's Theory of Innovation identifies entrepreneurs as innovators that

propel the economy to a new level of development by breaking the routine circle flow of the economy, not a man ordering management ability, but one who introduces new business ventures (Hagedoorn, 1996).

The Uncertainty Risk Bearing Theory of Knight originated in 1921 is based on entrepreneurs seen as a risk bearer and this can impact on the business profit which he has to bear. With the COVID-19 pandemic, it is certain that all the risks associated with the business are the responsibility of entrepreneurs and some of the female entrepreneurs could not bear the risks for long. The theory of Frank Young provides the notion that the initiatives of entrepreneurs are conditioned on changes in the group (Ameh & Udu, 2016). It goes on to say that the entrepreneur is not individual based function but as a direct manifestation of his groups. The economic theory of entrepreneurs proposed by Paparek (1962) and Harris (1970) is of the opinion that economic incentives and gains that propel the entrepreneurship to diverse initiatives and through which economic growth takes place in favourable (Kumar, 2020).

Motivation is the drive that makes an individual go the extra mile to do things and in return, expects a form of reward, of which all business owners are set up to be rewarded in one way or the other. It is seen as factors that initiate, direct and sustain human behaviour through time. Motivation classified as a natural human desire or an impulse rising from an external concept towards making individuals work hard for gains. Motivation is an internal process that stimulates an individual to maintain a particular way of behaving towards achieving set goals (Baron, 1991).

Others have viewed motivation as the movement of the fear of failure for the gain of external gains. For Hertzberg (1987), also, motivation is seen as the growth function for external rewards that enables the individual stimuli for an action for growth from external factors (Ryan & Deci, 2000). Most of the female entrepreneurs in this study are motivated and dedicated to their business success and therefore would be demotivated if the success does not come with the business. Motivation is the driving force in an individual that compels them physiologically and psychologically to pursue one or more goals to fulfil their needs (Lam & Tang, 2003).

It is clear from the literature and experience that the motivation of the female entrepreneurs is the power, incentive, enthusiasm and interest for the human behaviours which the action leads to a reward or consequence for the individual. In the case of the female entrepreneurship motives and desire to do a business the power of being the boss, get monetary reward and other incentives, hence the determination to stay in business to achieve their goals (Equity theory). The level of motivation has a great impact on human behaviour (Huang, 2016). Maslow's Hierarchy of needs theory emphasises the need to fulfil the basic needs of life and the moment the need is satisfied; food and safety become key to entrepreneurship. Herzberg's (1987) hygiene theory also helps with the understanding of motivation to aspire in life of which running a business to achieve success is key to entrepreneurship ventures.

Female Nigerian entrepreneurs in the UK

Women have been in business for decades and more and more women are becoming entrepreneurs every year including Nigerian women in the UK. COVID-

19 suddenly began to affect the UK in March of 2020 and it has highly affected women in business in many ways. Many offline businesses had to close temporarily or permanently due to the pandemic. This includes huge changes in economic, social, domestic, environmental, education and businesses for women entrepreneurs. Many female-led businesses had to close on many high streets across the UK, this included beauty salons, hair salons, women's clothing stores, shoe shops, stationery shops, food stores which affected many of their businesses and has led to a crisis in so many ways and changes to how women work.

Most of the Nigerian female entrepreneurs in the UK own their business to meet the basic needs and also, to gain finance reward. With the current challenges of the pandemic, most of the urge to aspire and be successful is now threatened and some having to close down their businesses. Other challenges imposed on female entrepreneurs in London concerned about cost of premises, business rates, regulatory agencies and taxation has resulted in higher costs of running the business as the costs in most cases outweighs the benefits. Childcare is one of the issues confronting the female entrepreneurs at the present time, most of the schools are on lockdown leaving parents to work from home and look after their children and teaching them hence combining the business and childcare demands.

On the positive side, there are some opportunities associated with running their business, for instance, those on essential business like food stores are able to tap into the local resources, develop knowledge and skills and opportunity to access the local customers (Sasangi, 2005, in Durowoju, 2014).

The COVID-19 pandemic

In 2019, Coronavirus (COVID-19) was discovered in a marketplace in a city called Wuhan in China. The initial clinical results of the scientists proved that the transmitted virus could be easily spread to affect the entire world from a person to person (Zhu et al., 2020). The WHO announced it that the world was in crisis of a virus based on testing carried out with the rapid spread of the disease. The announcement resulted to the world lockdown to reduce the spread of the disease (WHO, 2020). The social distancing known as 'mindful increase of physical gap between humans to limit the spread of the virus (Red Cross, 2020) has meant that all involved in education to comply to the strict government rules and regulations.

The statistical evidence indicates that 95.1m cases and 2.03m deaths worldwide from disease (WHO, 2020), with the high spread of the virus found in Italy, America, Brazil, UK and India having the most number of reported cases. In the UK, the impact extends to all businesses, and has hit many small businesses particularly hard.

Methodology

Drawing from the work of Saunders et al. (2015) played a key role on our choice of approach to the work. Research methodologies provide philosophies and strategies of which the researchers become capable of conducting research in a systematic approach or vast manners. The combination of both primary and secondary were useful steps followed to gather the data. The gathered data is analysed below in a small scale and hope to progress the research to a higher level. Data analysis based on comments of the entrepreneurs. Targeted entrepreneurs that

accepted to be part of sharing ideas on motivation and demotivation to sustain their business at the current pandemic and how they are coping with the changes in business operations has helped to understand the degree of the challenges and impact.

Findings

Coaching some of the women from African that own their businesses, most of them seem highly motivated and positive to work for themselves, either to work online and from home. This has meant that women have had to increase their multi-tasking skills and combine their businesses with their home life, particularly those with children. With government initiative of lockdown to reduce the Coronavirus, most of the women now work from home online and also at the same time making sure that their children are educated. Women entrepreneurs that are married with kids have had to teach their children which are compulsory working with their teacher's online, cook, clean and work virtually using their laptops and platforms like Zoom and social media platforms instead of taking their kids to school and having their regular time allotted to focus on their businesses.

The impact has led to domestic issues such as an increase in stress, feeling overwhelmed, frustration, anxiety and in some cases abuse and domestic violence. However, some women have been able to leverage the virtual world in powerful ways: they have had an increase in clients, sales, income and still somehow been able to relax, de-stress from their offline businesses and spend quality time with their families, as well as saving money from transport and petrol.

COVID-19 has had both positive and negative impact on the female entrepreneurs all over the world and mostly for the participants in this survey as they share their experiences with the crisis of pandemic. There comments are presented with consideration to ethical issues and compliance to Data Protection Act 1989; hence I have represented the comments using the word A1-A10. The comments from the participants were chosen to share based on the importance attached to them.

A selection of comments from the research interviews:

Q1 What has motivated you to become an entrepreneur?

> *I have always wanted to work for myself and not for anybody, because of control and doing my own things as I would want it to be. I work for me and I feel satisfied that I have my own business with four people that I manage and they are loyal to the business. Unfortunately, I laid them off because of affordability at the current time. The shop is locked up and I try to sell a bit on line but nothing much is happening than incurring more expenses.* (A1)

Q2 How would you classify your business and for how long in business?

> *I am into catering business and with a restaurant which is affected by lockdown. We hoped that the business could be recovered after the first lockdown, we expected to open which we did try around the Christmas, and the second lockdown has not helped at all. We understand that it is about protecting our health and safety and to reduce the spread of the virus, however, when you also compare it to the financial stress and losses; you feel that the world is over. However, we hope that vaccine will do the job to get people back to the business. I am busy online given more customer*

care and health and safety training to my employees preparing them for the future as I want to continue with the business after the pandemic. I can't wait to get back to work. (A2)

Q3 What are the key challenges that you have faced as an entrepreneur since the lockdown?

Another comment was challenges of child care, as parents:

We are now home tutors, working from home and also teaching the kids. I have four young children and both myself and husband work from home. Although, we both take it in turn to teach the children liaising with the teachers on what to teach, also preparing food, clean the house and time to get them to bed, also working from home can be demotivating. However, some aspects of working from home has kept me motivated being in close touch with the family. (A3)

Another interesting comment that emerged was on racial issues, as stated, the support for the Black female entrepreneurs in the covid period is very limited. It could also be because of the fear of many dying; black people may not have opened up or sorted help to support their businesses, Nigerian women are usually comfortable, hardworking and very proud to ask for help or do not want to be turned down when asked for help. For instance:

My sister applied for the government loan, she did not qualify for it because of the criteria attached to qualify for the loan as her business did not make enough profit. She became demotivated and decided to close down the business for peace and inability to sustain the business, she is now looking for a full time job which is also difficult to get. More black women would like to do their own business but the support has never being there for them to grow, it is not only in the covid period, it is a long history. I would recommend more support for the black women in business mainly the enterprising Nigerian women; they work very hard and need more support to grow. (A4)

Q4 Briefly outline some of the positive and negative challenges you have experienced since the first and second lockdown

Despite the negative comments, one of the entrepreneurs has had positive experience as commented:

I have had a positive experience making an online sales resulting to business growth and making more money than expected. This has being my only motivation since the covid period, but lost grandmother which results to demotivation facing a family bereavement, regardless of the covid turbulent, the business is doing well on-line that could not have being the case. However, I could do with more financial support especially after the pandemic. (A5)

On the negative, another has stated how she quite her business and decided to work to make the ends meet:

I decided to quit for a new job as no booking from the clients as a coach. People are not booking for training now due to holding on to their money because of the fear of the unknown. It is a tough time at present, getting clients, as people are worried about the fear of unknown, but I refuse to be demotivated, move on with what is available which is now job hunting. (A7)

Q5 How are you embracing the digital technology to support your business?

> *I must admit, it is not easy, on the other hand, it helps to connect me with more people out there but knowing how to use it is the problem. I prefer the face to face experience which is not great online. For me I need more training to embrace online advertising, however, I am learning how to embrace virtual marketing to promote the business. It is not easy for me because of my poor IT backgrounds. It is a big challenge for me embracing online marketing and getting clients online is a big issue at present.* (A10)

Conclusion

The above approach has enabled conclusive thought about some of the challenges currently impacting on the female entrepreneurs and their motivation to use the virtual aides working from home to sustain their businesses. All the entrepreneurs interviewed agreed that they are part and parcel of the society and support the local community provide job opportunities, no matter how big or small their businesses may be presented. The majority of the entrepreneurs interviewed (9 out of 10) felt highly demotivated due mainly to financial losses, childcare issues, working from home due to lockdown which cannot be underestimated. Some of the female entrepreneurs (3 out of 10) said they are unlikely to sustain the business any longer and are likely to close down in few weeks due to financial constraints. The most interesting result is that some have made good money selling with their businesses seen as essentials.

The purpose of this work is to present some of the positive and negative impact of COVID-19 pandemic on women entrepreneurs living permanently in the UK and suggests measures to support women entrepreneurs in their business venture, the motivation and demotivate experienced in their coping in this burning period of economic downtown caused by COVID-19. It is therefore recommended that the Nigerian women in business living in the UK be supported and encouraged in their business ventures, considering that they are part of the UK growing economy. Training and development opportunities and motivation incentives will help with their motivation.

These women have shown that they are highly versatile and able to take on multiple roles, in business and in their home lives, but they have also faced considerable strains because of the pandemic. A key question for further research is: What does the future hold for the African Nigerian female entrepreneurs in the UK?

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The Role of Teaching and Learning Aids/Methods in a Changing World

Abstract

The activity and method of teaching and learning identifies the input factors (students, teachers, instructional materials), the process (research, leadership, student services), and the output factors (employable graduates, knowledge creation and economic growth). Teaching and learning activity is also seen in the skills, attitudes and research orientation of the students. Negative physical and social conditions may affect the quality of effective teaching and learning. It is important that an enabling environment be put in place for effective teaching and learning skills. Furthermore, it is the responsibility of teachers to be sufficiently trained on the use of teaching aids, and have full understanding of their subject in order to pass on the right knowledge to students. The use of pictures, video clips, objects, internet facilities help the students to have a real-life imagination of the context of what is being taught. This leads to the reinforcement of learning: what we hear we forget; what we see we remember; what we do we understand. Motivations for transforming 21st century learning are the lack of preparation for life and work, emerging student characteristics, disengagement and high dropout rates, lack of motivation, the changing conditions and needs of the 21st century labour market, and global scenarios like economic and social crises, global diversity, and climate change. By effectively delivering knowledge content, students acquire transferable skills to be globally competent, think out of the box, and have an intelligent understanding of the complexity of technology.

Keywords: teaching, learning, students, teachers, labour market, global competence

Introduction

Okebukola (2010) identifies that the activity and method of teaching and learning includes input factors – teachers, facilities, instructional materials, students, and curriculum. These input factors are combined in the process of teaching, administration, research, quality assurance, and community impact. The output shows the skilled and employable graduates, new knowledge created, responsible citizens and economic growth. Teaching and learning activity is seen in the skills, attitudes and research orientation of the students. In devising the most effective way by which knowledge content can be delivered, leaners are taught technical skills, exposed to career awareness about the labour market, equipped to have an intelligent understanding of technology and stimulate creative thinking (Ogbulogo, George & Olukanni, 2014). Recently, students have demonstrated poor interest towards learning and ability to recall what has been taught (Joseph, 2015). This could be as a result of the teaching methods used by the teacher during the teaching and learning process in the classroom. In order to enhance teaching and learning activities, and avoid learners getting bored during lecture sessions, teachers are encouraged to use pictures, short video clips, and social media tools. These help students to have a

vivid picture of a particular context. The diverse teaching methods used in today's world provide opportunities to enrich and develop teachers. A teaching method is an effective way to organise learning and unite both the teacher's and learner's efforts. It is important that teachers are creative and professionally developed to use and combine these teaching methods.

Problem statement

There is an explosive growth in the volume of information available to learners. Information is now in multiple forms like texts, graphics, video and audio. As a result, teachers have become saddled with the challenge of how to teach learners to make sense of the vast amount of information they find, identify credible sources, question authenticity and accuracy of information, connect new knowledge with prior knowledge, and discern its significance in comparison to what they already understand (Facer, 2011).

Teaching aids

Teachers are great facilitators of knowledge and skills in the 21st century teaching and learning profession (Joseph, 2015). Teachers use teaching aids to enhance classroom instruction, extract learners' attention and create a motivation to learn. These teaching aids are devices (computer, DVD), instructional aids (book, chalk board, picture), or objects (specimen, map, globe) that help the teacher to effortlessly carry out the teaching-learning process. A lot depends on the creative abilities of the teacher. The use of teaching aids can facilitate the learning process by making it interesting and less time consuming. The use of teaching aids enables learners to use their hearing or seeing abilities and actively perform something while learning.

Types of teaching aids

On the basis of time-period

- Conventional/traditional teaching aids: When technology had not yet appeared in the form as it is available today – there was no electricity, phones, computers or internet. Chalks, blackboards and 'dust and mud sketching' were used by teachers as a standard teaching aid. Elements of nature, actual objects and specimen were written and presented as teaching aids. Books formed the traditional or conventional resource available to both the teachers and learners.
- Non-conventional/modern teaching aids: With the gradual technological progress, non-conventional teaching aids became available to teachers and students like computers, television/radio, and interactive whiteboard, multimedia. The modern teaching aids present themselves in different forms. A world of opportunities like teaching aids, games, activities and media have become available to students. They have made teachers' task both enjoyable and challenging. The use of non-conventional teaching aids play an important role in the teaching and learning process today.

On the basis of the sense organs involved

Teaching aids are also called audio-visual aids. Contemporary teaching aids that are in use provide stimulation to ears and eyes together compared to the traditionally used teaching aids that stimulated only one sense organ. The emerging teaching aids involve other sense organs (Đurđanović, 2015). These teaching aids are visual aids (illustrations, textbooks, magazines), auditory aids (sound recordings from CDs), audio-visual aids (combination of audio and video materials, DVDs).

Projected and non-projected aids

Projected aids include PPT, slides, film-strips, overhead projectors, TV/VCR as they can be projected on screen to give an enlarged image of the material. They can be used suitably for large and small groups. The large, bright and colourful images make them more effective than a non-projected aid. Non-projected aids do not require projection screens. Such materials are simply shown, hung or touched, e.g. chalkboard, whiteboard, charts, posters, pictorial materials and models. They provide first hand experiences, make the learners actively participate, stimulate students' interest, ensure better results and longer retention.

Teaching and learning methods in the past, present and future

Past education system

The education system in the ancient days was based on the Vedic, Brahmanical, Muslim, British periods (Siljander, Kontio & Pikkarainen, 2017). Education was compulsory in Vedic periods and students were handed over to the teacher. Education was based on war, protection, arts and craftworks. Vocational education emerged and was based on teaching and learning craftwork. The invasion of the British contributed to the development of the education system. British education gave more importance to the school system up-to-date. The British established several schools and provided facilities in the education system. Significant changes were made in the syllabus, methods of teaching, and the education system. Despite this, access to education was the privilege of a few, with majority being denied in many countries. Teaching and learning process was based on personal experiences. Knowledge and basic social skills were developed by interacting with other people and things (Siljander, Kontio & Pikkarainen, 2017). As a result, there was no room for change or innovation beyond the level of knowledge and skills of the previous generations.

Present education system

The present education has a great difference from the past. Yet, it is still not playing a significant role to teach and develop the youth for the changing world (Carneiro, 2007). The main aim of modern education is to develop skills and knowledge to make money. School owners mostly measure success on financial growth rather than value for students. Evidence shows that the present education environment and system of teaching and learning are inadequate to address and support 21st century learning needs (Carneiro, 2007). In most cases, education system in underdeveloped countries is not evolving. Therefore, students graduate

without the knowledge that is needed to make them better citizens or improve their lifestyle and morals. Because of this business-minded system of education, students are not qualified for proper jobs, and teachers are not ready to train students on practical life skills. Job seekers are being disqualified during interview processes because the education system fails to teach the basic skills and knowledge that are required in real life (UNESCO, 2015). Nowadays, education gives more importance to technology. Students are only graded based on examinations without an understanding of what has been taught. This exposes the puzzle on whether students are tested based on their 'recall' skills or actual intelligence. The present education system does not adequately differentiate students' knowledge and abilities.

Future education system

The future of the education system is uncertain still one can predict how it will be shaped. Future educational systems are expected to transform from institutions with strong emphasis on teaching to organizations with increased emphasis on learning (Scott, 2015). Government authorities must be responsible and take proper action to make some useful changes in the education system. The aim of the future education system is not just to confront new challenges but to create a world for all (Scott, 2015). The future system of education will give more importance to countries' development, students' training, skills and professional qualities. The role of teachers will be transformed from subject experts to guides and coaches (Ericsson, 2012). Educated people are the main asset of a nation. Education plays a vital role in developing personal and social life, and shaping tomorrow's leaders. However, it is feared that the education system is going backwards; that the poor of society cannot risk taking out loans to fund expensive studies and, social mobility will be determined by where people grow up and not by ability. There have been talks regarding the role technology will play in the future of education. Although traditionalists are fighting for children to go 'back to nature'; teachers should be open to embrace advancements in technology, ensure its usefulness in the classroom and employ more effective ways using recent research about how people learn (Scott, 2015). Education is becoming unpredictable and unsteady because future jobs are not in existence today. To solve unexpected challenges, a future-oriented curriculum should be developed to equip students with the right knowledge and skills.

Global competence

Global competence is the capacity to examine local, global, and intercultural issues; understand and appreciate others' worldviews and perspectives; engage in open, appropriate, and effective interactions with people from different cultures; and act for collective well-being and sustainable development (OECD, 2018). It is multi-faceted and includes cognitive development, socioemotional skills, and civic learning. Four dimensions need to be developed for students to interact with others both locally and globally (Scott, 2015; P21, 2013). The first dimension is the capacity to critically examine and solve global issues such as poverty, trade, migration, inequality, conflict. The second is the capacity to think critically and understand different perspectives and world views. The third dimension emphasizes on preparing youth to collaborate across different cultures and backgrounds to

address any sociological, political and environmental difficulty. The fourth dimension emphasizes on acting constructively to address issues of sustainability and well-being. The world requires multi-faceted responses because of its complexity (OECD, 2018). Skills in these dimensions are needed to examine and work toward resolving issues with local and global significance.

Nations, foundations, scholars, international organizations, and educators around the globe are working to develop students' knowledge, skills, attitudes, and values that are relevant to global competence. Drivers of change that affect teaching/learning for global competence are based on themes that cut across the curriculum or transformed using existing lessons. Regardless of the subject or the teaching/learning method, global competence requires a culture that engages students to constructively interact with each other and their teacher on differing perspectives and complex topics.

Teaching for global competence

To gain global competence, students need to be actively engaged in their learning and have the opportunity to reflect. They need to learn how to cultivate their curiosity and ability to think critically. To make informed decisions and collaborate with different backgrounds, students must be prepared to deal with complex issues like economical, socio-cultural, health environmental and geopolitical concerns (P21, 2013). Students need to practice global competence skills in the classroom and apply them to real-world topics. Textbooks, lectures, and memorizing correct answers to factual questions have their place in students' learning, but they must be paired with more active, engaging pedagogy to develop global competence. Today's learners learn in a conducive environment by using trial and error methods to explore, express and exchange ideas using technology before arriving at solutions (Facer, 2011).

Classroom culture

To foster global competence, effective classroom cultures must be created where students have the freedom to respectfully express their opinions with their teachers or fellow students, select which media to access, which tools to use, and how, when and where to use them to support learning (Scott, 2015). Although digital learning tools are now used to support student learning compared to the traditional tools, only a few teachers have made use of these technologies in their 'teaching'. Technology in itself does not drive learning except learning tasks are clearly defined. Benefits are rather derived from the collaboration, creativity and communication that technology supports. Digital tools will affect what and how students learn in the future (Redecker & Punie, 2013).

Students' perceptions of one another can be influenced by who takes on classroom duties, how teachers create teams for projects and how seating arrangements are designed. This way, students are able to tap into the rich diversity in the classroom and illustrate concepts in the curriculum using multicultural examples. These concepts include human rights, cultural diversity, injustice, inequality, and oppression.

Instructional approaches are familiar to teachers and can be applied to develop students' global competence. Regardless of the instructional approach, teachers need targeted professional learning opportunities to support education for global competence. Instructional approaches for global competence include:

Structured discussions and debates

Students learn to openly express their perspectives, back up their opinions with evidence, listen for understanding, and be willing to change their minds when confronted with new information (Witherspoon, Sykes & Bell, 2016). To stimulate a discussion or debate among students, the teacher uses a text, thought-provoking video-clip or controversial image. They engage in class discussions by practicing their communication, collaboration and argumentation skills, researching a particular topic, defending opposing positions on global issues from multiple perspectives, and raising awareness on global issues (Sun et al., 2015). Students form two teams, one supporting a statement and the other opposing it.

Availability of anytime/anywhere learning

In the present and future system of education, the workplace, home, community, 'on-the-move' (mobile) offer powerful sites for flexible learning compared to just the school environment (Carneiro, 2007). Learning activities are no longer done in the classrooms alone as the demands for educational service delivery is increasingly independent of location. The availability of smartphones and broadband networks allow people to access learning irrespective of the time and location. There has been a major shift from traditional educational institutions toward a more diverse and complex system of learning using a wide variety of educational institutions and third-party providers. Schools are expected to "reposition themselves in the emerging learning landscape" (Gijsbers & van Schoonhoven, 2012). The school is not the only place students learn. As leaning begins to move out of the classroom into homes and virtual communities, students are able to link their learning into the real world and become more self-directed. As students become familiar with digital tools, they are able to engage in more diverse settings, interact with others, and apply their knowledge in new contexts.

Conclusion

This paper has addressed the teaching and learning aids/methods related to future learning and global competence. Irrespective of the multiple factors driving change in the way students are educated, the fact remains that students are not learning adequately under the present education system and are not being equipped with the skills and knowledge needed to lead productive working lives. Learning should be tailored to the needs of each student to help them reach their full potential. This way, students will be able to interact with their own communities, deal confidently with people from other cultures, while engaging in learning activities throughout their lives. Just as teachers cannot revamp the education system alone, nations must critically evaluate traditional education to determine whether schools are living up to current expectations and equipping students to compete in a global economy. Every nation can contribute to a global pool of expertise on how best to

implement 21st century learning based on its context. Education should prepare students to develop transferable skills such as collaborating among themselves to solve scenarios of real-world challenges, reflecting on their ideas, strengthening their critical and creative thinking capacities, showing initiative, and exploring analytical skills.

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Discourse on ECD Practitioners' Perceptions of Leadership Practices in a Multicultural Environment: The South African Context

Abstract

This empirical paper reports on perceptions held by early childhood practitioners about leadership in a multicultural environment. The paper problematises leadership in early childhood development (ECD) centres dealing with diverse ethnic children from the Black South African communities. Among others, it discusses the attributes required for leading a multicultural ECD environment, to contribute to ECD centre effectiveness. Managing a multicultural community is complex, however experienced leaders appreciate the validity of differences and commit to managing a multicultural environment. This empirical paper employed qualitative semi-structured approach to interview managers and practitioners on perceptions held about ECD leadership in multicultural centres. The increasing demands and expectations on ECD centre leaders having learners from diverse cultures, languages and backgrounds, reveal preparation and support challenges. Achievement of positive perceptions may require training, support and resources, because their absence may in fact lead to heightened tensions and prejudices about leaders by practitioners. Recommendations are that ECD centre managers be supported by government to develop cultural pluralism, inter group harmony, and the ability to think, work, and live within a multicultural context.

Keywords: early childhood education, early childhood development (ECD), ECD centre, township, leadership, practitioner perceptions, multiculturalism, diversity, multicultural environment

Introduction

The paper reflects on early childhood development (ECD) practitioners' perceptions of leadership in multicultural environment, looking at the leadership attributes of ECD centre managers in a multicultural Black township environment. ECD applies to the processes of child development from birth to nine years of age, and includes the physical, mental, emotional, spiritual, moral and social development of the child (Atmore, Van Niekerk & Ashley-Cooper, 2012). Managing a multicultural ECD centre requires managers who motivate practitioners to achieve the core mission of the centre through quality teaching and learning. Such managers should have skills to develop practitioners to teach learners from different racial, ethnic, or socioeconomic backgrounds**.** This goal is not easy to achieve in Black ECD contexts where untrained ECD practitioners have to teach large numbers of children from the local South African areas, as well as from international migrant families (Kotzé, 2015).

The context of early childhood centres

The ECD structure of South Africa is two-fold: one regulated and sponsored by the provincial government, and an independent one run by private bodies or communities (RSA, 2015). This paper focuses on ECD centres led by centre owners, who are government sponsored, old and not keen to advance themselves further, professionally and academically. These managers are mothers and grannies who decided to establish the early childhood education centres to help mothers who are employed but cannot afford the formal ECD centres, that are expensive and far from their homes. The ECD centres became a business opportunity in the Black communities to benefit both the employed mothers and the grannies who were previously unemployed (Modise, 2019). Their ECD centres are informal but they were encouraged to register under the Department of Social Development (DSD) to get sponsorship. These centres offer Pre-Grade R programmes designed for children between 0-4 years of age, and 5-6 years (Leshoele, 2016). The challenge, however, is that most Pre-Grade R centres operate without proper documentation and have untrained and unqualified practitioners. According to Modise (2019), the optimal leadership of ECD centres require skilled leaders and practitioner support from relevant stakeholders, to make teaching and learning in ECD classes effective. In other words, collaboration with all the stakeholders is important.

Leadership in a multicultural environment

Supported ECD centre leaders can reconstruct the national teaching and learning education system and make fundamental inputs to existing educational policies and practices, to suit multiculturalism, multilingualism and multiethnicity (Le Roux, 2000). The different cultures in SA require multicultural leadership skills in common human values and specific values where specific groups behave differently and have different beliefs and cultures. These groups may have different/specific values from the various ethnic groups, as well as common/shared values by all the different ethnic groups in the society. In such an environment, the leader and practitioners have to recognise the common societal values that can be developed from specific values, to avoid clashes and to encourage tolerance and acceptance between the different groups. Different cultural/specific values will influence education as children are introduced to multiple value systems promoting diversity in classrooms (Nakaya, 2018).

Practitioners' perceptions of ECD leadership

ECD leaders' understanding of the notion of cultural and social contrasts in early childhood education, influences how children learn about general stereotypes at an early age. For multicultural and multilingual teaching to succeed, practitioners should lay the foundation of intercultural relations, tolerance, and language competencies to the child at an early age (Garifullina & Garifullina, 2019). Currently practitioners teaching in the multilingual and multicultural township or Black residential areas, are not competent in all the languages spoken in the township and cannot promote multilingualism since the learner's home world and that of the centre are not integrated. Trained managers and practitioners can discard

differences and facilitate similarities to arrive at sameness. The lack of support for ECD centres in the homes, churches and garage-based centres, cannot create a theoretical foundation that develops teacher personality for a successful multilingual and multicultural teaching. Additionally, lack of training funds from government to ECD centres creates a barrier to practitioners' teaching and learning programs on children in multicultural environments (Nakaya, 2018). Hence, leaders and practitioners cannot ensure young children benefit from the multicultural ECD centres in the Black communities.

Support for ECD practitioners

Supporting practitioner can ensure practitioners are familiarised with the traditions of children's culture through ethnic culture practices that foster mutual openness, interest and tolerance. Children from different cultures can develop ethnocultural values from similarities in other cultural values and from own individual cultures. Critical stereotypes related to minority cultures may be addressed to establish harmonious learner-practitioner relations. The objectives of multicultural education is to introduce all ethnic nationalities into one culture (Modise, 2019). The lack of preparation and training, however, challenges the practitioners' application of multicultural and multilingual teaching because the curriculum does not address disparities in cultural diversity. This perspective of learning ought to be reviewed to connect theory and practice to merge the children's worlds without compromising their cultures.

Centre practitioners and multilingual teaching

South African government's goal of making early childhood education accessible to all South African children, is an acknowledgement of the importance of ECD centres in South Africa. The constant influx of people from surrounding provinces, and, immigrants from various neighbouring South African countries, necessitates practitioner training in skills required in a culturally diverse context. The leader's attitude, knowledge base and cultural intelligence, is crucial for ensuring practitioner support in these culturally diverse classrooms. Once, supported, ECD staff may acquire a deeper level of sensitivity to the cultural and linguistic needs of learners. This means the centre staff should have proficiency in many languages (Republic of South Africa, 2015). The challenge, however, is that, not all practitioners and centre leaders can communicate effectively in two or more languages with more or less the same degree of proficiency, and learners in the classrooms, too, do not speak more than one language. Therefore, during teaching, learners from different ethnic groups should be grouped together to allow them the comfort of sameness, and to bridge the dominant culture in the school. The grouping of multilingual learners may prompt them to reflect on the advantage of activating their own linguistic and cultural differences in the classroom, through the use and manipulation of their linguistic and cultural skills during the lesson (Moua, 2011). The interaction of local and international learners may help in closing the gap of unfamiliarity and cultural knowledge in the classroom. This practice, however, may be challenging to anxious learners who may sometimes grow discouraged and may

not participate. Therefore, practitioners should support the learners by being sensitive to their difficulties.

Teaching multicultural classes

Teaching in a multilingual class requires the skill and knowledge of the use of multiple languages in a classroom. Multicultural education and incorporation of the culturally different learners is more effective in the mainstream culture and society (Banks, 2015), if the process serves as a resource, and not a liability. Therefore, practitioners should ask for help from parents, by setting up English learning tasks to be translated into the different languages spoken at home, in support of multilingualism in the class. Since language is not stable and is always subject to negotiation, practitioners should adapt it for classroom learning that engages issues of language difference(s). Teaching learners from internal migrations, and from neighbouring countries in mother tongue should ensure this is in line with the multi-ethnic context, to bring success to the teaching and learning of all learners. The material developed for centre teaching should be written in mother tongue to allow for ease of use by the practitioners. A learner's development may be negatively affected if cultural habits are not concurrently developed with other areas of their learning (Moua, 2011).

Research methodology

In exploring the discourse on practitioners' perceptions of leadership practices in a multicultural environment in the South African context, the following five key aspects focused on, to establish the ECD leadership practices in multicultural contexts and the views of practitioners: the vision of management and leadership in centres; practitioner preparation for multilingual classes; changes that can be made in ECD centre leadership; the expectations for management/leadership in centres; and, managers' expectation of support for practitioners and learners. From each centre 7 female participants (1 centre leader, 6 practitioners) were interviewed individually, and in a focus group for 30-45 minutes each of the ECD centres in the different townships. The total participants interviewed from the three centres were 21 female participants, since there were no males in the centres. The interviewed groups were mostly professionally untrained except for a few (four) trained practitioners in all three centres. The interviews were digitally recorded using audio recordings, transcribed and analysed.

Discussion

Theme 1: Training and support for practitioners

The response from centre leaders and practitioners regarding the centre vision, yielded similar sentiments of adequate training required for teaching multicultural children in the centres. The leaders were aware that the children's foundational cognitive abilities, attitudes and skills needed to be developed in preparation for primary schooling and the rest of life. They acknowledged that they were old and untrained and could not study further. They wanted practitioners to be provided with

knowledge and resources for teaching multicultural ECD centres, and to cater for the well-being of practitioners and learners. This is what they said:

> *Although practitioners do not all have the required ECD qualifications, most of them can learn on the job because they love children, a quality more important than a certificate.*

They also wished the government could fund practitioners for further training since the parents in the community were either unemployed or earned very little money to can contribute to the centre. They said:

> *Parents around the centre are poor and earn very little money. They cannot make any contribution because they are struggling to make ends meet. The government must fund practitioners to study further.*

Theme 2: Love for children

Centre leaders emphasised practitioners' love for children has prepared and motivated them to work with children, however, skills development in teaching multilingual classes requires the acquisition of skills for teaching multilingual and multicultural classes from a formal training, together with the love for children. This view was supported by practitioners who stated that they enjoy working with children and viewed their role as practitioners as very rewarding to their career. They said:

> *We do not have qualifications but if trained, we will become good leaders. We love children and we have good role models in our leaders, even though they are untrained and old. We know they want us to continue with this type of business in future.*

The leaders and practitioners blamed the previous apartheid government and said that it knew the situation of parents in the community but did not help fund the centres and practitioners to improve multilingual teachers in the centres.

Theme 3: Funding and resources for the centre

Regarding what can be changed in leadership, centre managers felt that trained practitioners could become better leaders if trained in colleges or universities to get the ECD qualification. They knew that their age did not allow them to study further since they are old and commented as follows:

> *Practitioners need more training to become better leaders than us. We are old and cannot start going to school. As centre managers we care about the children and together with the practitioners, we do not want to see children left uncared for.*

What both leaders and practitioners wanted done differently in leadership was the provision of more support in the form of funding and resources for the centres and the practitioners. The leaders said:

> *The government should give us funds to empower the practitioners and to buy resources for the centres.*

Theme 4: Government appreciation of centre managers

Regarding the expectations of management/leadership in centres, managers as well as practitioners required the government to appreciate the effort taken to ensure children are kept in safe places and their comments were:

Parents pay centre fees, but not all of them. The salary they get is enough for rent and food, however, they appreciate our efforts for starting the centre and are greatly involved in the centre. They help clean and make teaching aids when they are off from work. The government, however, does not appreciate our efforts.

Centre managers' initiative of helping working mothers who could not take their children to formal centres that are expensive and far from home, is appreciated by practitioners. The parents who leave for work early and come home late, appreciate the centres near their homes because even when they are late from work, they find their children in a safe place. The managers indicated:

We are indeed good people. Parents are happy about us. We have to approach the government for centre support to enable practitioners to teach children in a way that will prepare them for the future.

Theme 5: Importance of formal education for centre success

The managers' expectation of support for practitioners and learners was for government sponsorship of each child to be increased as it was very little, compelling centre managers to ask for contributions from parents who earn little money. The practitioners' responses too valued children experiencing a formal education by qualified practitioners, taught about diversity and equity in a formal setting to enable practitioners to serve diverse learners in ECD classes. Training and preparation might clarify cultural perspectives, and provide opportunities for better understanding of children's cultures to align them to their background; they said:

We all need formal education. Children who do not experience a formal education, struggle in school and may lack self-confidence if they do not have knowledge that other children have. Poor teaching experiences can limit later cognitive development of learners. A formal education in a college or university might be of help in teaching multicultural classes.

Centre managers in a Black multicultural education context are having challenges in ensuring quality teaching and learning is provided to multilingual and multilingual classes because of lack of resources and support for practitioners. Managing culturally different learners entail bringing different cultural backgrounds together and converging these and the value systems to help the centre function as a whole (Hall, Barden & Conley, 2014). Therefore, managing multicultural centres should focus on preparing and training the centre staff to understand what is good for cultural groups having different philosophies of life. Knowledge gained from a formal education environment might improve performance and promote employment opportunities later in life. Managers should therefore ensure practitioners receive training and support in order to promote a better cross-cultural education in the centre**.**

Conclusion

It is important that centre managers meet the educational demands of a multicultural society rather than achieve social integration. In a pluralistic society like SA, with multicultural learners, the government should ensure that the minority cultures are not undermined by neglecting their culture and socio-economic situation. Notwithstanding the fact that handling a multicultural community is complex, leaders need to recognise the validity of differences, and show

commitment to managing a multicultural environment. The diverse learners with different cultures, languages and religions, should be provided with resources to develop its young ones. Therefore, leaders of centres need to apply a paradigm shift of acquiring knowledge and skills necessary to ensure effective leadership occurs in a multicultural context.

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Revisiting the Tension between Management and Leadership Practices in Ensuring Quality Teaching and Learning

Abstract

Leading and managing schools across the globe requires accountability for the utilisation of resources entrusted to schools for improving the quality of teaching and learning in schools. Little, however, is known about the school managers' effectiveness in accounting for the schools quality teaching and learning. This paper explored school managers' accountability in leading and managing schools for quality teaching and learning in South Africa. The research question posed is: How effective are school leaders and managers in addressing the tension between management and leadership practices in ensuring quality teaching and learning? Despite most school leaders and managers believing that they do their best to improve the effectiveness of teaching and learning in schools, available literatures on the same, contradict these perceptions. The study therefore concludes that, school leadership and management is not an effective accountability mechanism for ensuring quality teaching and learning in schools in South Africa and recommends a policy shift on school leadership from a control approach to an innovative and collaborative approach.

Keywords: leadership and management, accountability, contextual intelligence, teaching and learning, collaboration

Introduction

This paper is in essence a summative analysis and interpretation of existing literature on the leadership and management practices of ensuring quality teaching and learning in South African schools. Education plays a significant role in improving the socioeconomic conditions of individuals and communities and requires accountability to be of quality. Given that the youth make up the largest proportion of the population in the country, it is important to ensure that they are effectively developed to contribute to the existing pool of knowledge for the betterment of the society. Employment requires skills, knowledge and competencies that enhance a worker's ability to secure and retain a job, progress at work and cope with change. Attainment of this goal, according to Bejaković (2014), requires leaders and managers to ensure education and training is based on high-level skills, ability to work as a team, possession of problem-solving skills, information and communications technology (ICT), and communication and language skills. This combination of skills may be achieved if there is no tension between management and leadership practices in the world of work.

The South African government has allocated a considerable portion of the budget to the education sector to improve the quality of teaching and learning in schools. Despite the public funding pumped into the education sector, the quality of

teaching and learning leaves much to be desired in Black schools. Informing the writing of the paper are four assumptions, viz. that (a) school leadership and management is important for ensuring quality teaching and learning in schools; (b) school leaders and managers have the skill to improve teaching and learning in schools; (c) school leaders are responsible for ensuring school staff members are supported to provide quality teaching and learning; and, d) that teaching and learning should be supported through resources. Informing these assumptions is the notion that school leadership and management should foster teaching and learning and increase organisational effectiveness. The paper has included both a review of literature on leadership and management, accountability, and, an analysis of existing school leadership/management practices.

Leadership and management

This conceptual qualitative paper highlights the importance of accountability in ensuring quality teaching and learning in schools. Principals placed in charge of social organisations, occupy a unique position which requires skills to ensure quality teaching and learning is achieved. The position they occupy demands the combined role of both leadership and management for the performance of the two functions in all contexts. The two roles which represent two sides of the same coin, puts different demands of accountability on school principals working in a given school context for the achievement of outcomes. Simply stated, principalship is an important function of leadership and management, though Bush and Glover (2014), state that management and leadership differ, particularly with reference to the school principal's role, and that the practice of both creates tensions and dilemmas.

Principalship is complex and places demands for management and leadership on the principal from a multiplicity of sources. Firstly, the demands put on the school principal are a mix of leadership and management demands, evidenced by current policies on standards for principals in developed and developing countries (DfE, 2015; DBE, 2016). Secondly, various stakeholders expect one principal to serve various constituencies ranging from the education department, the school governing bodies, teachers and learners, and the broader community. Lastly, the organisational environment in which principals operate is dynamic and complex and places a special demand requiring principals to have contextual intelligence. As managers, principals are expected to manage resources, data and processes; to consider policies, take decisions, act upon them and account for both the decisions and subsequent actions. Furthermore, they have to be innovative and take their organisations forward from one improvement level to the next, in response to contextual demands (Bush & Glover, 2014). These different expectations create tensions, leaving the principal trapped between both sides.

Quality teaching and learning

Quality teaching and learning is a pursuit of innovations in an education system. It is a systematic way of encouraging, monitoring, and evaluating all the innovations so that positive results, negative consequences and costs are measured, documented and reciprocated where necessary. Accordingly, innovations that may yield success in ensuring quality teaching and learning require training and professional

development for teachers, modification of roles and responsibilities of head teachers to include support supervision of their peers, engaging key school stakeholders in performance review meetings, signing customised performance agreement with teachers and head teachers, mobilising teachers to work as a group in setting and marking exams (Serdyukov, 2017). For the above to be attained, the school principals need to have strong technical capacity to do work and to diagnose problems affecting teaching and learning as far as the interventions are concerned. Principals need to identify the behaviour, and social relationships, policy and legal issues that are of concern, and come up with appropriate intervention strategies to address them.

Attaining the above, requires principals to find resources (time and money) to allow teachers to take up the vital work of professional knowledge production. They have to support through their work to build up a staff of like-minded teachers, and also develop strong out of school friendships with them. The work of leading/managing relies heavily on trust and reciprocity. The principals however are often caught in a double bind where systemic emphasis is placed on individual performance of schools and the individual leadership of the principal, rather than collective performance or collective leadership (Mulford et al., 2008). Supporting continuous professional development of teachers is a very important quality improvement intervention initiative to be prioritised by the school principals and all government structures, with sufficient budget allocation. Every changing school environment should be scanned using a framework and appropriate strategies to respond and account to identified learning challenges in the schools so that they can be understood and dealt with (Henard & Roseveare, 2012).

Accountability theory

The study uses an accountability theory advanced by Philip E. Tetlock (Lerner & Tetlock, 1999) which holds that no social system can function sustainably without an accountability check on its members. Trust and internalisation of norms alone are not sufficient for institutions to function effectively. First, the fact that the principal has a legislative authority to ensure quality teaching and learning, the influence of leadership and management cannot be wished away. The state provides the school with resources and has a legitimate expectation for accountability for managing these resources (DeCenzo, Robbins & Verhulst, 2016). Similarly, the school community expect effective leadership from principals, who have to rely on leadership theories for guidance in meeting the community's expectations. The choice of the accountability theory is based on the knowledge that school leadership and management is an accountability function (Hislop, 2017) and that, accountability as an organisational function, defines peoples' way of reasoning, and shapes their behaviours and actions; and sets performance standards that define rewards and penalties in organisations. Accordingly, Tetlock's (1999) accountability framework is used to guide people in decision making, and the framework entails:

Accountability as a universal feature of decision environments, a distinct attribute of discernment that reminds leaders to act in accordance with the existing norms of a society; provides a rationale for people to behave in conformity or contrary to the existing norms; and, it is an indispensable condition for the

attainment of quality teaching and learning in schools. It connects decision makers to their society and results in accountability in performance of tasks.

People seeking approval for both intrinsic and extrinsic motives. Principals' support for staff will be shown by their automatic response to situations, for example, by becoming happy, angry or even frowning. Extrinsic motives, on the other hand, may be revealed by the ability of the individual to seek approval from the leader they consider more powerful than them in terms of control of resources.

People's motives to attain quality teaching and learning will influence their interaction with others. People who are motivated may seek social approvals, minimise the cost of relationship; maximise benefits in a relationship; they may need affiliation; and hold certain internalised principles and convictions.

People always link their motives to coping strategies. It is up to the principal to always choose strategies that are feasible or have potential to enhance teaching and learning or damage the school's reputation. Prevailing circumstances can increase or decrease motives. For example, the contextual situation may result in the staff choosing to be cooperative, confrontational, duplicitous, candid, rigid, opportunistic, principled, decisive, oscillating or chronic complainers. Thus, in their attempts to balance leadership and management demands, the school principal faces tension, and the possible way of reducing such tension requires contextual intelligence to ensure quality teaching and learning is accounted for in the school.

Contextual intelligence

According to Kutz (2015), contextual intelligence is the ability to 'recognise and diagnose the plethora of contextual factors' in a given situation and adjust one's behaviour to influence that situation. Contextual intelligent principals can understand the limits of their knowledge and to adapt that knowledge to an environment different from human capital, information processing demands, and are effective (Khanna, Jones & Boivie, 2014). Such principals understand how schools can gain and sustain competitive advantage, as well as make well-reasoned strategic decisions. A contextually intelligent principal encourages people to see the brighter side of the future and creates a sense of urgency for everyone to shift from the present situation to the new one. Staff members are encouraged to take risks and are defended in the best interest of student learning and achievement (moral purpose). In other words, the promotion of a collective pursuit of a shared moral purpose, reduces the tension between management and leadership demands by focusing on what matters for both. The high management and leadership expectations that require contextual management and leadership skills, are lacking, and cause frustrations when principal are required to be accountable for quality teaching and learning (Marishane & Mampane, 2018). The absence of contextual intelligence makes the role expectations cause tension in the leadership course of pursuing a common goal of student learning and achievement. The school principal and the school are in a co-existential relationship with their context or situation. For a school principal to succeed in their core business, they need to gain knowledge of the context, and, its dynamics.

Contextual intelligence, which has its roots in psychology and is based on Sternberg's *Triachic Theory of Human Intelligence,* which involves the ability to recognize and diagnose the plethora of contextual factors inherent in an event or

circumstance, that intentionally or intuitively adjust behaviour in order to exert influence in that context (Kutz, 2015, p. vi). It includes the ability to influence anyone, anywhere and anytime. Such intelligence is demonstrated in four significant ways, notably: a) recognising the shifting dimension of a situation; b) recognising individual differences in terms of creative, analytic and practical skills needed for success (goal setting and goal achievement) within a given context/situation; c) knowing, understanding and demonstrating the behaviours (hindsight, insight and foresight), that are considered important in a situation; and d) adjusting one's behaviour at the right time to exert the right amount of influence when the situation changes. The latter involves applying common sense/tacit knowledge to a situation. Tacit knowledge is defined as whatever needs to be known for one to work effectively in the environment without necessarily being taught or told what to do (Sternberg, 2003). It is about being *smart/streetwise* – to use an everyday expression.

Discussion

From literature reviewed, Mulford and colleagues (2008) found that the existing tension in leading and managing schools for the improvement of teaching and learning are manifested through four key dimensions, namely: control/change, care/responsibility ethics, major imperative, and major function dimensions. *Control-change* dimension involves the tension principals experience between externally imposed change and control of schools (through policies, standards, monitoring and evaluation systems). These emphasise stability on the one hand, and school autonomy marked by internally generated change, aligned with the needs and goals of the school, on the other hand. The c*are/responsibility ethics* dimension involves the tension between participation and collaboration based on the ethics of responsibility (demanding accountability, efficiency and certainty) and participation and collaboration based on the ethics of care for the wellbeing of teachers and students (considering effectiveness, innovation and individual differences). *Major imperative dimension* involves the tension between personal time and professional task, leading to a situation where principals sacrifice their personal time to satisfy the demands of the job. *Major task dimension* represents the tension between management and instructional leadership, where management shifts principals' attention away from focusing on teachers, learners and instruction, to focusing on 'paperwork', procedures and systems, while the instructional leadership does the opposite (Mulford et al., 2008).

Conclusion

Both educational management and educational leadership focus on purpose, specifically, and school effectiveness and school improvement, respectively. These are articulated through student learning and achievement – complementary goals of quality teaching and learning. One of the core responsibilities of the school principal who has contextual intelligence is to acquire knowledge of, and create a collective sense of, a moral purpose. Resolving the tension between management and leadership, in line with the current change in focus from school management to school leadership, requires being responsive to the context of this shift, a suggestion

that the principal should transform from being caught up in the mixed context, to someone who is contextually intelligent in behaviour, practices and knowledge possessed. School principals find themselves in a situation where they face competing demands of their working environment by virtue of their profession and employment. The competing demands reinforce that human existence cannot be divorced from its world, because *being-in-the-world* is part of that existence. Principals cannot succeed in meeting contextual demands – however pressing – by working at the mercy of this context, they need to interact with their environment. They have the capacity to shape the environment and take control of the interactive relationship between their leadership and the environment, which consists of people, work, working conditions and related factors. According to Bray and Kehle (2011), for one to fit into the environment one should be able to shape and adapt to the current environment and select an environment better than the current one. Success in this regard depends on the principal's understanding and acknowledgement of the existence of multiple, and sometimes conflicting demands, from the internal and external school environment, and sharing that understanding with others. Equipped with this understanding, the principal can ensure that there is a collective ownership of what matters to move the school forward; what needs to be prioritised in terms of the school's cherished norms, beliefs, values, goals and vision – underscored by a sense of a widely shared moral purpose. It is against this background that the application of contextual intelligence is suggested as a strategy to reduce existing leadership tensions.

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Safeguarding the Future and Right to Education of Children with Disabilities in Nigeria

Abstract

Children, just like every human, are entitled to rights which have been described by some as fundamental and inalienable to human existence. The right to education is one of such rights and is essential in the development of man and his society. Disability stands as a major hindrance in the actualization of the right to education of children in Nigeria. This paper examines the plights of Nigerian children with disabilities as it relates to their right to education. It highlights the physical, social and attitudinal barriers children with disabilities face which negate and hamper their right to education. The discussion in this paper is hinged on the legal regime that affects the right to education of the Nigerian child with disabilities which include: Nigeria's Constitution; Nigeria's Child's Right Act; the Convention on the Rights of the Child; Universal Declaration of Human Rights; and the African Charter on Human and Peoples Right. It posits that attitudinal change and need for the adoption of best practice are the panacea for the protection of the right of education of Nigerian children with disabilities.

Keywords: children with disabilities, right to education, child's right and attitudinal barriers

Introduction

Children with disabilities (CWDs) are one of the most vulnerable groups in society. A large percentage of children with disabilities in the world live in developing countries. A 2017 World Bank Study revealed that the literacy gap between CWDs and their able-bodied counterparts has been on the increase over the last 3 decades. This is as a result of several factors including marginalisation, segregation and discrimination. The situation in Nigeria is no different. CWDs in Nigeria face several challenges in actualising their right to education. The first challenge being the negative cultural perception that exists about disability as well as several other challenges. Disability is viewed as a curse amongst many cultures in Nigeria. There are other negative cultural perceptions that exist about disability. This is sometimes seen in the language used to refer to persons with disability. Labelling people with disability imposes severe limits on them from a cultural, social and economic perspective; this imposed limitation that isolates them from the culture and the society (Eskay et al., 2012).

Children with disabilities suffer discrimination even within the family unit. They are sometimes excluded and isolated from family interactions and are tucked away from the outside world because of fear of stigmatisation from members of society. Some are even marginalised and denied participation in house chores and other informal education within the home. They are viewed as liability and just useful for begging alms.

The right to education of CWDs is one the least considered rights for such children in the society. They are most of the time allowed to enjoy their right to life simply for moral and perhaps religious reasons and not because they ought to be treated equally as others within the family and the society. It is thought that children with disabilities are not useful nor constitute an important part of society that can contribute to the growth and development of the society. Neither is there hope that like their able-bodied counterparts, they would grow to care for and support aging parents. Rather they are viewed as liabilities that may depend on others throughout their lifetime.

This paper examines the rights to education of Nigerian children with disabilities. It adopts the view that their rights to education is a human right. The laws pertaining to education and children with disabilities both internationally and locally are appraised. It discusses the plight of children with disabilities with respect to education and proposes recommendations to safeguard their right to education.

Conceptual clarifications

Child

Article 2 of The African Charter on the Rights and Welfare of the Child (1990) defines a child as every human being below the age of 18 years. Article 1 of The Convention on the Rights of the Child (1989) also defines a child as '…every human being below the age of eighteen years'.

Disability

Cambridge dictionary defines disability as a disorder, impairment, or deficiency that makes it challenging for a person to do the activities others do. Section 57 of the Discrimination Against Persons with Disability (Prohibition) Act (2018) includes 'long term physical, mental, intellectual or sensory impairment which in interaction with various barriers may hinder full and effective participation in society on equal basis with others'. Disability includes physical impairment (for example visual, speech, hearing and mobility impairment), mental impairment, intellectual impairment and sensorial impairment. Persons with disabilities would therefore be persons having or experiencing a disorder or deficiency that makes it challenging to participate in full all life's activities (Adiela, 2019). Disabilities may result from man-made causes (such as accidents), and man's inhumanity to man. Negligence by health care providers, biological factors and poverty are other causes of disability.

Human rights

Human rights, regardless of background, gender, age, national origin, language, religious belief, or indeed any other social position, are rights fundamental to all human beings. They typically comprise the right to life and equality, the right to freedom of thought and speech, the right to education, and much more. These rights are made for free enjoyment of all simply on the basis on their "humanness" and without prejudice. Human rights are principles which acknowledge the value of all human beings and protect them. They regulate the manner in which humans or citizens of a state reside in and with each other, and also the responsibilities of the state to its citizens (UNICEF, 2007).

Education

Education can be defined as a method of information acquisition through research or knowledge transmission through directives, tutorials or other techniques. Aristotle defined Education as the act of coaching people to achieve their goal by implementing all the skills to the greatest potential as a responsible citizen (Kumar & Ahmad, 2008).

Education stretches further than what occurs inside the classroom or any designated place. Children observe their environment and receive education from their encounters, experiences and interactions outside the school premises. Therefore, education can be classified into formal and informal education.

In general, formal education or learning mainly occurs at the school campus, in which a student can acquire primary, academic, or commercial skills, such as a nursery school, primary school, secondary school, university and so on.

Informal education adopts non-use of specific methods of teaching. It does not require the deliberate act and process of a formal education. Learning can take place anytime and anywhere without the need for a formal curriculum or time table. It includes transfer of skills and knowledge through observation, hands-on practice and storytelling.

For a meaningful human life, education is of great significance as it helps an individual to actively engage and work effectively in society by improving the society and themselves.

Right to education

In the implementation of human rights, education is fundamental to the economic, social, civil and political development of a nation. The right to education imposes legal responsibilities on government decisions on education for its citizens.

The Universal Declaration of Human Rights (1948) provides for the right to education, highlighting in Art 26 that elementary education must be compulsory. In Nigeria the government must guide its policy to guarantee the availability of free, fair and equitable education at all levels while seeking to eliminate illiteracy (Section 18(1) (3) Nigerian Constitution, 1999). In 2000, the Nigerian government re-launched the Universal Basic Education (UBE) Programme in favour of these constitutional provisions and it is regulated by the Universal Basic Education Act.

According to the Child's Rights Act (CRA), every child is entitled to free, mandatory and universal basic education provided for by the government. Section 15 of CRA mandates the Nigerian government, parents and guardians to provide at least elementary school education for their children (including CWDs). The purpose of the right to education is that it must be offered without discrimination and to everyone.

Theoretical foundation

Right to participate

All people (adults or children) have the right to participate in and access information relating to the decision-making processes that affect their lives and well-being. Unfortunately, the fundamental strategy was to isolate or exclude CWDs

from the general society due to the assumption that they are inadequate and unlikely to adapt or survive in the normal society. Hence, they are often placed in segregated facilities, special school, and peculiar accommodation. It is opined that the right of CWDs to participate should be protected. This will guarantee that they are given equal right to participate in education and access information that relate to decision-making processes that affect their well-being and lives.

CWDs are vulnerable and usually susceptible to oppression, exploitation and discrimination. Therefore, ensuring they are educated, provides them with the opportunity to be exposed to the information their able-bodied counterparts have, thereby, giving them an opportunity to be able to fend for themselves and perhaps, contribute to national growth and development.

It is argued that where CWDs are included in mainstream education as against special education, it will improve their ability to learn in a normal and structured environment which will result in better understanding for them and also positively affect the able-bodied individuals to appreciate them as humans.

Principle of non-discrimination

Human right is built on the principle of equality and non-discrimination on any basis. Thus, disability should not be a basis for discriminating between children. Excluding CWDs from mainstream schooling will amount to discrimination. Similarly, excluding them from informal education within the family setting amounts to discrimination which the Universal Declaration for Human Rights (1948) stands against.

Legal regime

1989 Convention on the Rights of the Child (CRC)

The Convention wholly addresses the human rights of children and is significant due to the incorporation of an article that expressly addresses the rights of children with disabilities. Article 2 of the CRC, specifically prohibits discrimination on the basis of disability. This theory is guided by the understanding that differentiated or specialized amenities and structures for education and other areas of life, on the grounds of disability will promote exclusion. Thus, children should be educated and treated equally within the same space irrespective of their disability or otherwise.

The right of a child to education is embodied in Articles 28 and 29 of the CRC. The provision for primary education to be mandatory and accessible free to all is a vital effect as well as secondary education to be affordable and equally accessible to any child, with financial support given when appropriate (UNICEF, 2007).

African Charter on Human and Peoples' Rights Act 1981

The principal African regional human rights framework is the African Charter on Human and Peoples' Rights Act (1981). The Charter empowers every person to "enjoy the rights enshrined and guaranteed by this Charter without discrimination of any kind" (Article 2, ACHPR). The Charter contains special provisions specific to the unique "physical or moral needs" of the elderly and disabled to establish a comprehensive approach to equality for people with disabilities. States are also expected to take appropriate measures in ensuring that people with disabilities are

able to enjoy the rights and freedom provided by the Charter. The ACHPR was ratified and domesticated in Nigeria which birthed the domestic law, the African Charter (Ratification) Act (1983).

1999 Constitution of the Federal Republic of Nigeria

The Nigerian Constitution does not contain rights for children with disabilities, however this could be implied in section 42(2) of the Constitution with regard to the prevention of discrimination against people with disabilities, including children. It provides that "no citizen of Nigeria shall be subjected to any disability or deprivation merely by reason of the circumstances of his birth" (Section 42(2)).

Nigerian Child's Right Act 2003

This Act has provided extensive frameworks for the rights of a child. Section 16(1) of the Act ensures that any child in need of protective measures shall be entitled to a measure of protection adequate to their needs in furtherance of their active involvement in the community. The Act did not explicitly address the rights of children with disabilities but only mentioned children with special needs. However, the words 'disability', 'impairment' and 'handicap' are often synonymously used to describe people with 'special needs' (Boezaart, 2012).

The Act further broadened the rights of CWDs by providing that everyone or institution saddled with the responsibility to ensure the care or special protection of a special need child must strive to provide the much-needed support required for his education, job preparation and or rehabilitation in order to ensure his progressive development (Section 16). This provision restricts the enjoyment of the rights of children with disabilities to the availability of resources and at the discretion of their care givers.

Plights of Nigerian children with disabilities and education

There are several challenges facing children with disabilities that militate against the actualization of their right to education. Discrimination is the underlying challenge of children with disabilities. Others include negative perception of society towards disability, non-inclusive nature of the educational environment, finance, and lack of assistive devices.

Discrimination

CWDs are culturally perceived to be inferior to their able-bodied peers. They suffer discrimination, exclusion, relegation and are often treated as outcast. They are sometimes procured to beg for alms for the family. Families exploit the fact that they are sometimes viewed as objects of pity by some members of the society to make money for the family. They are made to beg for alms even sometimes against their wish while other family members enjoy a greater percentage of the bounty to their detriment. Such refusal is usually accompanied with threats to, and sometimes actual verbal and physical assault as well as denial of food. It is a case of either way, they lose from the venture.

CWDs are not given equal opportunity as their able-bodied counterparts in the family. Scarce or limited resources such as food, clothing and education are first

given to the able-bodied children before CWDs. Thus, CWDs are the least people considered to enjoy education. For some families, they struggle to understand why an invalid should be educated. Their thought is that such education amounts to waste of valuable time and scarce resources. This negative perception explains why CWDs are not properly fed, clothed or catered for like their other counterparts in the home and sometimes, hidden away from public view. They are excluded from participating in family time, chores and special activities, and informal teaching such as transmitting family values and handiworks to them. In fact, they are isolated, segregated against and excluded from the other children in the home. Thus, they grow up knowing nothing but discrimination. This affects their psychology to believe that they are second-class and inferior humans.

Even where some CWDs are encouraged to enrol in schools perhaps through the efforts of NGOs, they suffer discrimination from their school mates and teachers. A study carried about by Adiela (2019) revealed that children with albinism are bullied by their school mates, classmates and teachers. Same treatment or experience is faced by CWDs.

Lack of appropriate educational facilities and trained teachers

Public educational institutions are designed for abled-bodied children without consideration to CWDs. Most school buildings are built in such a way that children with physical disabilities will necessarily be dependent on others, thus subjecting them to ridicule and low self-esteem. School buildings do not have ramps, the toilet facilities are not large enough to accommodate wheel chairs, and sometimes the doors hinder the passage of wheel chairs. The play equipment, where such exist, are hardly suitable for CWDs.

The needs of children with visual impairment are not catered for as public schools do not have Braille machine for such children. Even in "special schools" the Braille machines are insufficient to meet the demand. Thus, mainstreaming children with visual impairment is almost practically impossible.

Children with hearing and speech impairment may look like normal children, thus may suffer verbal and physical abuse and bullying from their teachers and classmates who may initially not understand that they have a disability.

The other issue is lack of trained teachers to work with CWDs. There is a dearth of teachers in special needs education. This leaves CWDs in the hands of teachers who are only trained to cater for able-bodied children. Where such teachers encounter children with any form of disabilities (including learning disorders) they are at a loss on how to handle them.

Poverty

Poverty is another challenge that children with disabilities are faced with. The resultant effect of poverty on these children is that it makes their families procure them for begging of alms instead of sending them to school. Many CWDs that need devices to aid them are unable to get their required devices because of lack of finance to afford such devices.

Conclusion and recommendations

The negative perception that exists about disability negatively affects CWDs in Nigeria. CWDs suffer neglect, exclusion and discrimination in several areas including in education. Many families consider it as a waste of time and scarce resources to educate CWDs. They are instead used to beg for alms.

Although there are laws which guarantee the right to education of all children, CWDs still face several challenges in the actualisation of their right to education. These challenges include poverty; lack of appropriate educational facilities, assistive devices and teachers; and discrimination.

The following are some recommendations to safeguarding the right to education of CWDs.

1. Amend the Child's Rights Act by abolishing the discretionary clause in order to make the government obligated to include the special facilities and services necessary for CWDs to enjoy the rights provided in the Act.
2. A structure should be in place to promote teacher training to meet the needs of special needs children in educational institutions.
3. Government and NGOs should take it upon themselves to provide assistive devices to CWDs at no cost to their parents.
4. Government should implement the policy on inclusive education.
5. Government should implement the Discrimination Against Persons With Disabilities (Prohibition) Act (2018).
6. NGOs should intensify disability education of the populace especially within the rural communities. This way, some of the myths and negative perceptions about disability will be burst and changed positively.

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Quality Education and the Nigerian Dilemma: Imperatives for Counselling

Abstract

In this paper the researcher aimed to investigate the counsellors' perceptions towards the quality of education and the Nigerian dilemma as well as its imperatives for counselling. The qualitative analysis of the answers followed to identify the aspects that represent the content of formal education, quality of teaching, curriculum, and personal characteristics of the teacher, funding, staff remuneration, control and evaluation/examination. This also cuts across the educational implications of the essentialist theory, the progressivism as well as the reconstructionism. Another aspect centered on the counselling as a necessity for quality education to thrive. The paper concluded by suggesting that counselling should be seen as a tool to make the quality of education to thrive by giving it all supports by all educational stakeholders and ensures that adequately trained counselors should be posted to all levels of our educational institutions that will stand in the gap of the rising challenges in our educational system.

Keywords: quality education, Nigerian dilemma, imperative for counselling

Introduction

Learning according to English Learners Dictionary is the activity or process of gaining knowledge or skill by studying, practicing, being taught, or experiencing something. It can be in any form, in other words, it usually comes from what we may term 'education'. There are various kinds of education ranging from: formal, informal, and semi-formal education. Therefore, the purpose of this paper will focus on quality education as a derivative of formal education and the Nigerian dilemma looking at its imperative for counselling. Formal education is the type of education that takes place in an established system known as the school. It is structured and categorized into pre-school, primary, secondary, post-secondary and tertiary institutions as well as higher education. Formal education as an institution, is systematic, carefully deliberated, planned with rules and regulations, funded, staffed, graded, accredited, and awards certificates (Ekwueme & Igwe, 2001). Formal education having been charged with the responsibility of preserving and transmitting the cultural heritage of the people by showing knowledge and its appreciation as well as adherence to its norms, it is usually rigid in admission requirements and standards, in philosophy, curriculum (purpose, content, method and evaluation), and administration. Specific features of formal education system are discussed hereunder:

- Formal education is controlled and regulated at all levels by government agencies, proprietors and others.

- Formal education is guided by a curriculum. These are prescribed systematic groups of courses for every level. In the past, the curriculum has been centered on various systems such as: 6-5-4 in the 1970s, 6-3-3-4 system of education in the 1980s. Presently, the 9-3-4 system of education is in practice. All these have not actually in totality addressed the challenges of education in Nigeria. This could be as a result of the gab created in the aspect of counselling which has not been enforced in our curriculum even though it has been noted for action but not fully enforced to the later. This has made the whole system not to be effective to actualize the dream of the desired curriculum.
- A prescribed standard of qualified staff is maintained.
- Evaluation/examination take central position in the formal education system. There is periodic assessment of learning and programmes. Every formal educational programme in conventional tertiary institutions, universities or in an open distance learning programme has their various modes of evaluations/examinations along with their periodic time for such. This in which ever form it may be, should be able to assist the teacher be able to test the learners and place values and judgment on the outcome of their learning process.

Quality education

A quality education is one that focuses on the whole child—the social, emotional, mental, physical, and cognitive development of each student regardless of gender, race, ethnicity, socioeconomic status, or geographic location. It prepares the child for life, not just for testing.

Sequel upon these, quality education must be based on the following objectives if met. The aims of education, irrespective of the culture, perform the following functions:

1. They give direction to the educational system.
2. They are especially important for curriculum changes, planning, designing, and development as well as instruction.
3. They motivate actions.
4. They provide guidance for the learner, the teacher and the school administrator.
5. They provide the basis for assessing and evaluating the entire educational process in order to determine the success or failure of the educational programme and how well the educational system is working towards achieving educational goals.

Be it as it may, there are certain factors that would be considered relevant in the course of this presentation on quality education. These are discussed as follows:

Infrastructure / learning environment

Environment has a vital role in facilitating learning. The environment includes both natural and artificial environment. These include the tone of the school, the rules and regulations, the teachers' style of classroom management, the classroom furniture, equipment and teaching aids, the amount of ventilation and fresh air

available in the classroom, the distance of the school to busy road or to industrial establishment and many others. All in one way or the other affect learning.

Quality of teaching

The quality of teaching is always attributed to the teachers' technique of teaching. Generally, there is no best technique or method of teaching. However, there are certain fundamental principles which cut across all methods of teaching. These principles emanate from various psychology and theories of learning. These are:

- A student teacher must possess enough and accurate knowledge in his/her subject so that he can impart it confidently.
- Teachers should be able to come down to the level of the pupils/students in terms of explanation and language. Other areas he/she must take care of include improving the learning environment, planning his/her lesson well, adopting adequate and appropriate methods bearing in mind the age of the pupils, time, teaching aids/materials and the subject itself. Hence, without a teacher, learning will not take place in the formal classroom setting. This is why the quality in teaching is always being determined by the quality of teachers. The quality of the teacher affects the quality of the pupils/students.

The teacher

The teacher can be examined in two perspectives as follows:

Personal characteristics of the teacher

Generally, it is believed that students are the best judges of the personal characteristics of their teacher. Studies by various scholars have also confirmed that students are best judges of their teachers. Some of his/her characteristics which make for good and effective teaching are sympathy and kindness, helpfulness, patience, a pleasing personal appearance and manner, emotional stability and self-control. Others are fairness, impartiality, a sense of humor, honesty, enthusiasm, creativeness, resourcefulness, simplicity, adaptability, and humility.

Professional characteristics of the teacher

There is no gainsaying that teacher's qualities can hinder or promote good teaching. Most of the time, a teacher who lacks the listed qualities may constitute a problem to himself. However, no matter how kind, amicable and well-meaning a teacher is, he cannot succeed unless he possesses adequate and thorough knowledge of the subject matter. Apart from that, a teacher also needs to acquire some general knowledge. This will enable the teacher to be more efficient in the discharge of his/her task which is teaching (Ekwueme & Igwe, 2001). There are certain professional characteristics which the teacher must combine according to Ekwueme and Igwe (2001) with his personal characteristics to promote effective teaching. Those qualities are:

- A mastery of the subject to be taught

A teacher must be very knowledgeable on whatever topic, he/she wants to teach. He should read wide about the topic to ensure good understanding and good grip of the subject matter. This makes teaching simple and easy for the pupils/students.

- An understanding of the basic principles of children's growth and development

This is crucial, such that the teacher is exposed to the various ways by which the pupils learn their emotions and other characteristics, which can affect teaching. As a result of the variety of demands by the pupils/students and the subject matter, the teacher adopts various suitable techniques and methods to make the learners learn with ease.

- A positive attitude to the work

A teacher must have and demonstrate interest on the job. If the teacher does not like the job, obviously, he/she will not teach well, he/she will be quarreling with his/her tools, the students and in fact the environment as a whole. But if he/she likes the job, he/she puts in his/her best and uses all avenues to make the lesson interesting so that the pupils/students are motivated to learn.

- Willingness to adapt his/her teaching to local needs taking into account the materials available

A good teacher always endeavours to improve his/her teaching aids. The importance of using teaching aids is to facilitate learning. For a teacher to teach successfully, he/she must make adequate and proper use of teaching aids. Most of the time, the teaching aids are not available or they are costly to be purchased. The teacher is left with no other option than to improvise. However, the teacher should be very careful when selecting the teaching aids. Always make do with what is available or can be locally produced to minimize use costs.

Funding

Funding is another essential ingredient that guarantees quality education. From the perspectives on the issues of educational funding, education has been described as "a solely budget devourer, a barrel which is never filled" (Onyene, 2002). If therefore, education takes his shape in terms of finance, the enterprise requires huge input in form of material, labour and working capital. Considering the fact that investment in education does not take cognizance of economic situation of the nation due to increase in population and rising demand for education, a lot of finance hindrances tend to thwart educational progress. The effect of inadequacy of fund is mostly felt in administration of schools. Nevertheless, the general input factor always forms the major manifestation when calculating the achievements of a society via its educational system.

At the school level one discovers that school plant managers and administrators of pupils/students and personnel complain about running cost as the single most-pinching problem. This is not peculiar to any society (Garrett, 2013). Furthermore, education consumes more money than its result (Onyene, 2002). Ironically it is not economically approved as the most lucrative venture people can embark upon. Many factors could be responsible for the insufficiency of fund for internal school administration.

Staff remuneration

The teaching profession is one of the least respected professions in Nigeria today as it is the case in most developing countries of the world. Teachers from all ramifications are the builder of a nation hence they educate the youth that will later sustain the growth of the nation. This important role which the teachers play is not adequately compensated. If not for recently when the federal government had introduced some fringe benefits or remunerations such as the new salary structure called "elongated salary", housing and transport, utility, rent and leave allowances for all workers in the country, teachers would have remained very poor. These remunerations are added incentives to motivate and encourage teachers to put in their best for a better attitude to work, which will lead to high productivity and efficiency (Garrett, 2013).

Unfortunately, these remunerations are not so regularly paid to teachers as their counterparts in other employments. This usually leads to incessant strikes in the school system. According to Mbipom (2012), both staff and students have lost much time due to strikes for better conditions of service. Accordingly, as long as the hydra headed examination malpractice is around nobody seems to mind. The resultant effects are found in the half-baked and ill- equipped products turned out from the school system annually.

Curriculum

The totality of all the learning experiences offered to the learner under the auspices of the school, is very pivotal to quality education. Curriculum is one of those fundamental areas to be emphasized in any worthwhile teacher-training programme (Igwe, 2005). It provides us with the essential road map to achieving the specific objectives that are usable and realizable in a teaching-learning situation. Curriculum is very important in that it provides an opportunity for us to know the processes and techniques of content selection. The problems of what to teach and how to teach are central to the training of any teacher.

Some schools of thought and their influence on the quality of education

The implications of the various views on curriculum could be traced to the various views expressed by different schools of thought vis-à-vis essentialism, progressivism, and reconstructions have tremendous impact on the type of curriculum to be developed. As their views, thoughts and understandings differ so also the type of curriculum emanating from any of them. The implications of these various theorists to curriculum are seen below.

Educational essentialism is a theory that states that children should learn the traditional basic subjects and that these should be learned thoroughly and rigorously. An essentialist program normally teaches children progressively, from less complex skills to more complex. The implication of the essentialist theory could be seen that in developing any given curriculum, there should be a thorough study of the cultural heritage of the people. Knowledge should again be the focus of all educational activities. The essentialist thought will serve as an excellent source of both curriculum objectives and curriculum content.

The progressive school of thought on curriculum is based on the students' interests. Teachers have themes and objectives, but they do not just design a course of study for their students; they design it with them, and they have to be prepared to welcome unexpected detours. From the progressives view point the educational implications of their theory include among others:

- In developing a curriculum, there is the need to understudy the learner as an individual. There should be time for extensive inter-personal relationship on one-to one basis between the teacher and the learner.
- Curriculum planners and teachers should keep clear the distinction between curriculum goals. For learning to occur it is essential that students pursue goals that are their own, rather than artificial goals set by the curriculum.
- Curriculum content and activities should be designed to reflect the learner's interest, needs, wants, desires, problems and aspirations.
- Curriculum development will need to take special account of the psychology of the child and adolescent development.

Reconstructionism / critical theory is a philosophy that emphasizes the addressing of social questions and a quest to create a better society and worldwide democracy. Reconstructionist educators focus on a curriculum that highlights social reform as the aim of education. The implications of reconstructionism in educational curriculum can be seen as follows:

- In developing a curriculum, the emphasis should not only be on what to offer the learner to make him adjust or fit into the society but what the students, having gone through specific instructional programmes, can offer the society to bring about a desirable change.
- Attention has to be paid in the all-round education of the learner namely: the cognitive, affective and the psychomotor domains. The emphasis should be on comprehensive education that will make learners not only self-reliant but also instrumental to societal change and development.

Nigerian dilemma in education

Education in Nigeria is bisected with myriads of problems. These include: lack of trained and qualified counsellors in our schools, poor funding and thus poor educational infrastructures, inadequate classrooms, teaching aids (projectors, computers, laboratories and libraries), paucity of quality teachers and poor/polluted learning environment. In addition to these inadequacies, our school system is plagued with numerous social vices such as examination malpractices, cultism, hooliganism and corruption. For meaningful development to take place in the educational sector, the governments need to re-address the issue of funding. Private educational investors, teachers, parents and students/pupils need a reorientation towards achieving the goals of education.

Counselling as a necessity for quality education to thrive

The National Policy on Education (1981) made it clear that counselling in our schools is essential, paragraph 83 (1) of the policy document declare this in these words:

> *In view of the apparent ignorance of many young people about career prospects, and in view of personality maladjustment among school children, Career officers and Counsellors will be appointed in Post-Primary institutions. Since qualified personnel in this category are scarce, government will continue to make provisions for the training of interested teachers in guidance and counselling. Guidance and Counselling will also feature in teacher education programmes.* (Federal Republic of Nigeria, 1981, p. 30)

Olayinka and Omoegun (2003) asserted that guidance and counselling services should be an integral part of our educational system especially if we want education to be functional, child-centered and job oriented.

However, counselling as a necessity for quality education to thrive is a major point of note in the sense that, education is a formal teaching and learning process aimed at improving knowledge and the development of skills from elementary to higher education. Counselling through its wide array of quantitative services could be seen as an indispensible tool for reviving and sustaining the standard of education by making educational objectives meaningful and attainable to its beneficiaries. Counselling if well administered adds value to the education system as it enhances productivity of all the stakeholders; the students, teachers, parents, administrators and a host of others. No wonder, Awokoya (1983) rightly stated that without counselling services, the objectives of education would not be fully achieved. Counselling has the services that will accommodate and manage all these problems so that the students can function, adjust and react appropriately to these challenges. The services are orientation, informational, appraisal, counselling, placement, follow-up and referral services. These should be carried out on regular basis.

According to Mallum (2015), the counselor can use counselling to facilitate quality education in the following ways:

1. Helping the students to engage meaningfully in curricular and co-curricular activities so as to realize their potentials and talents.
2. Helping students to remove barriers that may inhibit learning.
3. Assisting students to make appropriate and satisfying educational, vocational and personal-social choices.
4. Assisting the students to develop career awareness through understanding of career opportunities, lifestyles that are reflected in different types of work and job openings.

Conclusion

It is clear that counselling occupies a rather special place in raising the standard and quality of education. However, consequent upon the observed fall in its standard, there is need for a reform that ensures a functional and vibrant system of education with respect to the present socio-economic and political demands of the citizens of Nigeria. The implementation of educational policies has suffered lots of setbacks and challenges, in other words, it has some constraints contending with it. If these problems are not checked, they can render the attainment of the objectives of education impossible. Therefore, for the achievement of educational quality through its objectives, it is necessary to incorporate the services of professional counsellors because it has the highest index of effectiveness as a way of promoting the overall growth of students. Consequently, all the stakeholders in education industry should

give extensive supports to school counselling programmes for it to succeed and achieve the desired impact. Parents, students, teachers, counsellors and other stakeholders of education should co-operate as close partners in the school enterprise to achieve a conducive atmosphere for learning in our schools.

Suggestions

For the purpose of this work, the following recommendations are made:

1. Counselling should be seen as a tool to make the quality of education to thrive by giving it all supports by all educational stakeholders.
2. Counsellors must be adequately trained and posted to all levels of our educational institutions especially in the public schools. Whereas private school owners must be mandated to employ professional counselors in their schools who are very verse in knowledge concerning the curriculum, job prospects of the students after graduation so that, our Nigerian education would be able to meet up with its standard in all ramifications of life and as such becomes relevance in the world of work at large.

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Safety, Health and Welfare of Nigerian Workers as Entrenched under the Factories Act of 2004

Abstract

The Factories Act of 2004, the Employee Compensation Act of 2010, the Minerals Oil Safety Regulation of 1999 and the Harmful Waste Act of 2004 are pieces of legislation that included provisions for the safety, health and welfare of Nigerian workers beyond the Constitution of the Federal Republic of Nigeria 1999, and the Labour Act of 2004. This paper critically examined the extent to which these laws, with more emphases on the Factories Act of 2004 which made provisions for the safety, health and welfare of Nigerian workers and how the tenet of these laws has been enforced to reduce occurrence of accidents at workplace. This paper examined Part III of the Act**,** dealing with the training and guidance of naive workers, in that, no person shall be employed at any machine or in any process that is likely to cause injury, unless he has been trained by a more knowledgeable person about the dangers involved. Part III further states that factories shall provide a means of escape in case of fire, and all escape routes shall not be obstructed. Part IV addresses the welfare of persons employed, which includes the supply of clean drinking water, made available in containers, renewed daily, and suitable clean washing facilities.
The findings showed that, in spite of the provisions in the Factories Act as well as other extant laws stipulating how workers safety, health and welfare is to be catered for, the rate of accidents at workplaces is increasing. Meanwhile, the examined laws will still require further review to include some of the observations and suggestions made in this work. Also, the major challenges found to be associated with the effectiveness of the Factories Act in ensuring safety, health and workers was perceived to be that the institutional agencies were not doing enough to regularly engage firms by enforcing corrective and punitive measures to erring firms. Therefore, the study recommends a special task force be setup to ensure daily compliance, the Ministry should be called to order for failure of exerting corrective measures when necessary. Finally, labour unions, human right organizations and other non-governmental agencies should sensitize workers of their rights, privileges and protection stipulated by the law.

Introduction

The Nigeria's Factories Act of 2004, the Employee Compensation Act of 2010, the Minerals Oil Safety Regulation of 1999 and the Harmful Waste Act of 1990 are pieces of legislation that included provisions for the safety, health and welfare of Nigerian workers beyond the Constitution of the Federal Republic of Nigeria 1999, and the Labour Act of 2004. Unfortunately, despite having this robust legal code, one still wonders why the rate of accidents in factories operating in Nigeria is on the rise.

Part V of the Act enumerates the measures to be taken to protect persons against the inhalation of the dust, fume or other impurities, and to prevent its accumulation in workrooms. Exhaust appliances are provided very close to where the dust, fume or other impurities originate from. This prevents it from polluting the air in

workrooms. Additionally, protective cloths and appliances such as gloves, footwear, goggles and head coverings are provided for workers who are exposed to wet, injurious substances.

Notwithstanding the above listed provisions of the law, there is still a consensus by various scholars that occupational health and safety is poor in Nigeria. For instance, a study of the extent of fatal injuries, and fatality rates from 1987 to 1996 of Nigerian factories by Ezenwa indicates that 3,183 injuries were reported of which 71 or 2.2% were fatal; the highest annual fatality rate of 5.41 in 1994; the lowest fatality rate of 0.94 in 1990 (Ezenwa, 2001).

Similarly, in another study carried out by Umeokafor, Allen and Umeadi (2014) on the pattern of occupational accidents, injuries, accidents causal factors and intervention in Nigerian factories between the period of 2002–2012, it was discovered that 80% of accidents occurred at night, manufacturers of rubber products accounted for the highest number of injuries at 53.8% and 63% for death, the total fatality rate was 49.5. Furthermore, fire resulted in 53% of the deaths, while management factors accounted for 91.3% of the remote accidents and 90% was due to deficiency in training.

The provisions stipulated in the Constitution and other acts regarding health, safety and welfare of workers in Nigeria do not capture every aspect relating to the protection of workers engaged by an employer or the regulatory agencies with the mandate of delivering oversight function and assigning punishment to defaulter are lacking greatly in the dispatch of their responsibilities.

Incidents of occupational health and safety at workplace should be supervised and documented by the regulating authorities so as to know how to make policies that will help to prevent further occurrence of accidents. All factories are expected to provide report of occupational accidents to the Federal Ministry of Labour and Productivity Inspectorate Division (FMLPID), which will enable the Ministry to enforce the Act, supervise and intervene whenever matters relating to occupational health, safety and welfare matters arises.

Therefore, this paper seeks to examine the extant laws and the function of institutions dealing with health, safety and welfare of workers in Nigeria in order to understand whether there exist lapses in the laws or the institutional agencies are lagging in their duties, identify their challenges then proffer some valuable recommendations as measures that will help in the reduction of occupational safety accidents.

Health, safety and welfare

Safety is a state of being away from hazards caused by natural forces or human errors randomly (Nas, 2015). Safety is also said to be a state in which danger and conditions leading to physical, psychological or material harm are controlled in order to preserve the health and well-being of individuals and the community. Similarly, occupational safety and health is generally defined as the science of the anticipation, recognition, evaluation and control of hazards arising in the workplace that could impair the health and well-being of workers, taking into account the possible impact on the surrounding communities and the general environment.

In the view of the World Health Organization, the combination of health, safety and wellbeing is explained to be “a state of complete physical, mental and social

well-being and not merely the absence of disease or infirmity". This means that an employee who is employed by an organization should have evidence of wholeness in his health status irrespective of the nature, magnitude of his assigned job.

Health and safety at work: A basic right of the workforce

According to Section 17 (3) (a) of the Constitution of the Federal Republic of Nigeria 1999, it is the right of every Nigerian to be gainfully employed in order to cater for himself. Therefore, the employer should rather see the engagement of an employee from a mutual benefit perspective in order to ensure a healthy employer/employee relationship at the workplace. Furthermore, Section 17 (3) (b) (c) stipulated that the right and work condition in which an employee will be engaged with should be 'just' and 'humane', with the health, safety and welfare of all persons in employment safeguarded.

Falana (2010) therefore opined that fundamental rights are generally regarded as those aspects of human rights which have been recognized and entrenched in the constitution of any country, hence, employers should ensure that, machinery and equipment are safe and without risk to health.

Anyakwe's (1997) assertion was that human rights are founded in a single demand, which is, that respect is shown for human dignity under any circumstance and this is explicitly stipulated in Section 17 (2) (b) of the 1999 Constitution, that the sanctity of an individual shall be acknowledged with the maintenance of human dignity. The ILO (n. d.) acknowledges the dignity of the individual and developed treaties tagged with labour codes based on the respect for the dignity of labour, which is the right to health and safety at workplace and the most paramount to this paper.

In fairness to the legislative arm of the Federation, Nigeria has formulated laws aimed at ensuring the protection of the rights of workers starting with Section 17 (3) (b) (c) of the 1999 Constitution which stipulates that an employer is expected to provide a safe working environment, equipment and procedure that is devoid of risk to the employees' wellbeing. Similarly, where an employee perceives a workplace to be dangerous to his health, he has the right to discontinue with such an engagement.

Furthermore, there are other laws promulgated to provide protection for the workers' health and safety, which include:

Factories Act 2004

This act is the primary legislation for the protection of the safety, health and welfare of workers. It provides for the health, safety and welfare of the workers exposed to occupational hazards by taking measures to prevent accidents and injuries. The Act includes the following**:**

- Part II which includes issues such as cleanliness, overcrowding, ventilation, lighting, drainage, sanitary conveniences and the duty of inspectors as to sanitary defects;
- Part III comprises of general safety provisions for workers working with machines and other equipment;
- Part V deals with special provisions and regulations on health, safety and welfare;

- Part VI provides for notification, investigation of accidents and industrial diseases;
- Part X states provisions that deal with offences, penalties and legal proceedings.

Specifically, with reference to Part III of the Factory Act 2004, which comprise Sections 14 – 39, the regulation stipulated safety precautions that must be adhered to regarding the interaction between employees and work facilities. These areas require keen attention in ensuring employer's compliance, because every work process require certain degree of mastery before attaining a given level of efficiency. Additionally, it is worthy of note that attainment of mastery in the use of certain work facility does not guarantee absolute exoneration of injury at work place. So employers should give routine updates of risk prone work facilities to their employees to reduce hazard that might occur by common avoidable mistakes.

Employers should provide fire extinguishers and fire alarms at strategic locations and train personnel on how to fight fire incidents in case of eventuality.

Unfortunately, as good as Part IV of the Factories Act appear, they are insufficient as there is no provision compelling employers to make full medical insurance available to workers. Employers should be made to provide different degrees of HMOs covering workers as this is in accordance with Section 17 (3) (d) of the 1999 Constitution which states that the employer must provide adequate medical and health facilities to her employees.

Furthermore, Sections 51, 52 and 53 (Part VI) of the Factories Act, stipulate that employers should notify institutional agency of accidents within a period of three days from the day of occurrence. And any employer who fails to report an accident under this section shall be guilty of an offence and shall on conviction be liable to a fine not exceeding N1000. This fine is grossly inadequate because it reduces the value of the employee whose life is at the frontline. This implies that a firm with worrisome incident might deliberately flout these laws because the consequence of violation is trivial. This fine should be repealed with a greater penalty capable of discouraging trivial handling of accidents at workplace.

Employee Compensation Act 2010

This Act was enacted to address the patent errors, loopholes and some other area not covered and repeals the Workmen Compensation Act of 2004.

The Act provides a shield and guides the employees who suffer from occupational diseases or sustain injuries arising from accidents at the workplace or in the course of discharging their duties in the workplace or off workplace but sent by the employer. This Act applies to all employers and employees in the public and private sectors in the Federal Republic of Nigeria.

This Act was enacted to equip the employee with a fair and guaranteed compensation for them or their dependent in case of any bad occurrence that may occur during the course of discharging their duties. It also caters for rehabilitation of workers when they encounter work-related disabilities. It establishes and maintains a solvent compensation fund which is done in the employees' interest.

Minerals Oil Safety Regulation 1997

This is another health and safety regulation enacted by the Ministry of Petroleum Resources through the power vested on it by Section 9 of the Petroleum Act. The regulation stipulates that employers in the oil and gas industries are to ensure that safety equipments are provided for workers. The regulation further stated that failure to comply with any aspect of the regulation is guilty and liable of being convicted to a fine of not more than N250,000 or not more than 5 years in imprisonment or both.

Harmful Waste Act 2004

The Law prohibits all transaction of harmful waste, except such transaction is done with a legitimate authority.

Issues and challenges

This work intends to look at the challenges that factories are facing to ensure that the health safety and welfare of their workers are guaranteed. Amongst them are:

1. **Lack of proper supervision**. The Factories Act of 2004 mandated all factories to provide report of occupational accidents to the Federal Ministry of Labour and Productivity Inspectorate Division (FMLPID). According to Umeokafor et al. (2013), records provided to the ministry are not followed up for further analysis which can help to understand work processes in each firm, thereby making it easy for them to take requisite actions that will help forestall such.
2. **Lack of punitive actions on defaulters**. The fact that the occurrence of accidents, according to Ezenwa (2001) and Umeokafor, Allen and Umeadi (2014) findings, is on the increase is an indication that defaulting employers are not punished appropriately to serve as a deterrent to others.
3. **Limited job opportunities**. The labour supply in Nigeria is geometrically greater than the jobs available to absorb them all and this has empowered employers to disregard abiding by the tenet of the laws. On the other hand, because of insufficient jobs, employees compromise demanding for their full rights according to the law in order to secure the job at hand. This has resulted in making workers unable to form or sustain a union within an organization.
4. **Lack of employee's awareness of their rights and privileges**. Most workers are ignorant of the dictates stipulated in the Labour law and are not conversant with the provisions of the constitution of the Federal Republic of Nigeria, let alone the Acts available for safety, health and welfare of workers. This makes employers get away with certain actions that could have been compensated for if brought before a court of competent jurisdiction.

Conclusion

In conclusion, the following recommendations can be made:

- A special task force be enacted to record, investigate, analyze, interprete safety and health accident report from firms, then provide their result and the actions to the company to respond accordingly within a time frame upon which they are expected to either compensate or penalized and correct the error form reoccurring.
- The Ministry of Labour should be called to order if it fails to punish offenders where an accident happens due to negligence or violation of the law by a firm, especially when it leads to injury or loss of life.
- The Federal Government through the Ministry of Labour and Productivity, Ministry of Youth Affairs and other intervention agencies should develop programmes that promote and increase the discovering, harnessing, sponsoring and mentoring of entrepreneurs with innovative ideas to create jobs so as to help workers from being exploited because of the availability of fewer jobs.
- Labour unions, human right organizations and other non-governmental agencies should sensitize workers of their rights, privileges and protection as stipulated by the law.

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Part 6
Research Education & Research Practice

Ewelina K. Niemczyk

The Impact of COVID-19 on Higher Education Institutions: Focus on Research and Teaching Practice

Abstract

The COVID-19 pandemic manifested in health and socioeconomic crisis that highly influenced higher education sector on many levels. UNESCO reported that in April 2020, higher education institutions were closed in 185 countries. This shows a dramatic and disruptive impact the pandemic had on all involved in higher education, from students to staff. The pandemic, however, also showed the importance of higher education to society and the need for higher education institutions to share research expertise about how to overcome the risks posed by COVID-19. This work relies on review of international research projects and global surveys conducted about the impact of COVID-19 on higher education. For the purpose of this paper, the attention is devoted to the impact of the pandemic on research and teaching at universities. The results showcase how the pandemic disrupted research activities and teaching practice around the world and how universities responded to the challenges posed upon them. The reported efforts taken by higher education institutions provide lessons of commitment and creativity that can be informative internationally. Now more than ever, comparativists are well positioned to provide solutions to current global challenges and to envision the path from the crisis to a better future for research and teaching in HEIs.

Keywords: COVID-19 and research, research and teaching during pandemic, research in times of uncertainty, research ethics, higher education, comparative education, global challenges

Introduction

2020 marked a time of crisis where social, economic, and environmental vulnerabilities were exposed. Due to Covid-19, millions of people suffered in terms of their health, loss of employment and the associated financial pressures (OECD, 2020). The pandemic also affected education sector including higher education research and teaching practice. In fact, higher education institutions (HEIs) were exposed to many challenges in areas of management, teaching, research as well as mobility and collaboration. The time of crisis positioned institutions and academics under restrictions and new regulations for which they were often not prepared. It is also essential to acknowledge that the pandemic "…has added to the stresses and workloads experienced by university faculty and staff who were already struggling to balance teaching, research and service obligations…" (Rapanta et al., 2020, p.

924). Although, we cannot accredit the existing vulnerabilities and workloads only to the pandemic, since some existed long before the outbreak, the pandemic did provide a magnifying glass and brought them to focus and to our immediate attention.

In terms of research activities, the pandemic restricted researchers in terms of data collection methods, dissemination of findings, international collaborations, just to mention a few. The above-mentioned adjustments and associated with them new approaches to research brought forefront also ethical concerns. Maglio (2020, para 4) calls attention to researchers' ethical responsibilities towards their participants reminding that "the starting point is to understand the ethical responsibilities researchers have towards those involved in educational research… Now more than ever before, research ethics should be at the forefront of every study that is undertaken during and after COVID-19…".

Researchers and academic community around the world were encouraged to join the conversation about Covid-19 to come up with much needed solutions to the emerging challenges. However, as reported by IAU (2020) due to the restrictions caused by the pandemic, some research studies have been put on hold and many researchers struggle to access the necessary laboratories. On a brighter note, the literature reports that the education stakeholders came together to de-stress the situation and support as much as possible academic research activities. As reported by Xu (2020, para 10):

> *While countries are being locked down, science has become more open. Since the outbreak of COVID-19, an increasing number of funding bodies, publishers, journals, institutions and researchers are embracing open science. Publications, courses, archives and databases are shared online freely, openly, quickly and widely.*

As per teaching practice, closure of universities and cancelation of face-to-face instruction affected the entire academic community. Scholars, students, and relevant support services (e.g., counselling services relevant to mental health) had to rapidly adopt to online teaching and online meetings, shift that was coined as emergency online education. However, Rapanta et al. (2020, p. 927) recognize a clear distinction between online education and emergency remote teaching:

> *Online education pre-supposes an existing organizational infrastructure, serving the purposes of online teaching and learning. In contrast, the emergency remote teaching required by Covid-19 has often been improvised rapidly, without guaranteed or appropriate infrastructural support. Given this lack of infrastructure, much of the early advice and support for non-expert online teachers has focused on the technological tools available in each institution and considered adequate to support the switch.*

On that note, we learn from the literature that shifting to online instruction created several issues, including the digital divide, especially in less developed parts of the world as well as lack of training in effective delivery of online modules. It is also worth noting that even for universities committed to maintain quality education and student satisfaction of remote teaching, some aspects are not easy to manage as the infrastructure and competencies at times are not at the desired level.

The following sections of this paper bring attention to examples of how the pandemic disrupted teaching and research activities as well as what can we learn from the observed shifts to build back better. The information and interpretation

presented relies on document analysis of international research projects and global surveys about the impact of COVID-19 on HE. Comparative and international studies, now more than ever, have the potential to provide joint solutions to current challenges and the path from the crisis to a better future of research and teaching in HEIs. As reported by IAU (2020, p. 6):

> *The overall understanding that our combined efforts generate about the current challenges that institutions and national systems face helps inform future perspectives of and on higher education. International and global perspectives are more important than ever in light of the pandemic and its effect…*

Research activities and ethics

Since early 2020, along with the lockdown, travel restrictions have been implemented which has affected researchers' international collaborations; participation in conferences and education societies; and establishment of new partnerships. As explained by Xu (2020, para 12):

> *Emphasis has shifted from cross-border movements of people and equipment to a focus on cross-border flows of data, information and knowledge. Conferences and meetings have been cancelled or postponed, with many moved to online platforms. Transfers to virtual spaces have increased the inclusivity, accessibility, cost-efficiency and environmental friendliness of such events, but also trigger concerns over digital equality, security and privacy.*

On similar note, Marginson (2020, para 22) reminds us that:

> *Cross-border research cooperation is less vulnerable than cross-border student mobility and has been maintained during the pandemic. While research benefits from conferences, site-based visits and exchange of personnel and large laboratories and institutes are inhibited by social distancing protocols, most forms of research cooperation can be sustained for a time online.*

As reported by IAU (2020), the biggest impact the pandemic had on research was based on the restrictions such as social distancing and ban of international travel, which led to cancelation of scientific conferences and other educational gatherings. In addition, research projects were in danger of not being completed on time since in person-data collection processes have been completely stopped and data gathering methods had to be adjusted (when possible), which meant securing new ethical clearance.

On the same note, Maglio (2020) reports that field research, data collection, and data analysis in many cases came to a pause point. She also brings attention to the fact that many longitudinal research studies were disrupted and the projects that do continue moved to online platform, which poses new ethical concerns. Solbakk et al. (2020) referring to health-related research ethics in pandemic times emphasize the urgent need to remain committed to core ethical principles and not to use crises as an excuse for lowering scientific standards. The authors report that one of the problems with knowledge-production of the Covid-19 pandemic is related to lowering standards of quality assurance of research studies being published. In fact, Solbakk et al. (2020, p. 12) validate their claim by saying that "It has been documented that the peer review process has been rushed ("express" or "opinion based peer review") and so far (October 28, 2020) 37 research papers about Covid-19 have been retracted", some from very prestigious journals.

Researchers and students had no choice but adopt ways in which they conduct research and collect data online or gather existing textual data (Jowett, 2020). As Jowett indicates the most common data generation methods became video-calling (e.g., Zoom, Google Meet), text-based instant messaging (e.g., WhatsApp), and online surveys. He also provides examples of available data sources:

> *For example, print media (e.g. news and magazine articles) can easily be used to analyse social representations of a wide range of topics. Broadcast media (e.g. television or radiodiscussion programmes) can imitate focus group discussions on topics, meanwhile published autobiographies or blogs can provide first-person narratives for examining a wide range of human experience. Social scientists have also conducted qualitative analyses of textbooks, websites, political speeches and debates, patient information literature and so on. Online discussion forums and social media have also been used to examine a wide range of social phenomena* (Jowett, 2020, para 4).

Teaching practice

The implemented restrictions caused by the fast spread of COVID-19, forced HEIs to change their teaching and learning process, which impacted teacher-student interaction and delivery of support services. The pandemic forced institutions to rely, in most cases, solely on online teaching, assessing students' performance, sharing feedback, and supervising. As stated by Mishra, Gupta and Shree (2020, p. 2) "online education became a pedagogical shift from traditional method to the modern approach of teaching-learning from classroom to Zoom, from personal to virtual and from seminars to webinars".

A report from Quacquarelli Symonds (QE, 2020) provides findings based on a large survey to share insights and lessons from universities around the world with the intention to inform and support other institutions. The following were the reported approaches to crisis management due to the pandemic: online learning, international coordination and collaboration, proactive and preventative measures, strong university leadership, flexibility for assessment deadlines and exams, stricter sanitation initiatives, clear communication from university leadership and administrators (p. 14).

The International Association of Universities (IAU, 2020, p. 6) shared Global Survey Report based on responses from 109 countries about the influence the pandemic had on higher education around the world. The findings showed that almost all HEIs indicated significant impact of the pandemic on their teaching and learning. In most cases classroom teaching has been successfully replaced by distance teaching; in other cases, institutions still look for solutions to continue teaching online. Many institutions were, however, not prepared to move online and had to close their campuses (mainly in Africa).

Technical infrastructure and online access were identified as main prerequisites for shifting to distance teaching and learning. The low-income nations struggle with investing in digital tools or online licenses and students from low-income families are the ones struggling with the access to internet at home. This not only delays their studies but also affects the completion of their academic year. As indicated by Paterson (2021, para 5) "Not only many poorer students may be less able to afford the cellphone, laptop, data and airtime costs of the shift to online tuition, they may

also be forced to return to homes where everyday hardships inhibit their ability to learn".

The IAU (2020) also reported that since different pedagogy is required for distance teaching, for many faculty members it was difficult to transition to online teaching. They were not prepared and often lacked technological skills. The quality of learning and the effectiveness of teaching online depends also on the field of study. In some areas such as arts or veterinary studies, actual practice cannot be easily replaced by distance teaching (IAU, 2020, p. 25).

Overall, the survey indicated that the quality of provision of online teaching differs across nations as it depends on financial situation, technical infrastructure in place, capacity of teaching staff to adapt to remote instruction, and the actual field of study. Students without access to internet and online communication tools (smartphones, tablets, laptops) are the most disadvantaged, which unfortunately maximizes existing inequalities in education.

Observed shifts and steps forward

As reported by Huang (2020), based on several international surveys (including the QS) and reports from individual researchers and nations, HE will be reshaped by the pandemic. First, he identifies decrease in the number of international students and scholars globally, which will have impact on universities that highly rely on tuition from international students. Second, decrease will occur in terms of funding that government provides for research and teaching activities at universities. The funding will decline especially for programmes and research in humanities and social sciences. Generally, he predicts that universities will be asked to deliver more with smaller budgets. Demand for stronger collaboration between universities, governments, and business sector is identified as another shift. Then, Huang brings attention to the fact that a wider variety of online teaching methods will be used to supplement traditional teaching. As he indicates, attention will need to be dedicated to master new technology and digital skills in teaching and learning, research, and administrative activities. Universities will need to invest in training of academics, staff, administrators and students about how to protect data privacy, data security and avoid violating copyright and other data privacy (Huang, 2020, para 21).

Paterson (2021, para 37) reporting the perspectives of experts who took part in the webinar themed Impact of a Pandemic: Global perspectives, stated that most respondents see benefits of "developing 'hybrid' models for teaching and research; as well as the relative advantages of the online and offline worlds as sites for education". Although the respondents acknowledged the disadvantages of hybrid model, they also expressed "the hope that it would produce different ways of knowing; foster greater societal embeddedness and transdisciplinarity; produce more democratic access to knowledge; and forge new kinds of closeness" (para 42).

It is evident within the scholarly literature that HEIs are transitioning from a crisis management place to the place of identifying opportunities for the future. In the span of a year, HEIs were able to overcome many challenges, under-sourced universities identified potential solutions, and the focus in many cases shifted to opportunities that came with change. Having said that, the ongoing struggles of low-income nations and pressures experienced by under-sourced universities are still evident and must be acknowledged. At the same time, it is important to recognize

that having learnt valuable lessons during the pandemic in 2020, which showed vulnerabilities in terms of access, equality, and relevance of technological skills, HEIs are engaged in strategic planning for the future.

Making informed decisions based on the lessons learnt aligns with the OECD (2020) message that the global society needs to build back better. Although the OECD report refers mainly to the recovery of health and economy sector, their message also applies to the education sector since at the end all elements of the society are interconnected. We need to be reminded that even though the pandemic will end at some point, we need to make changes for the post-pandemic era and adapt for the future that most likely will present us with new emergencies. The past shows that education can thrive on change and as scholars we have the capacity to develop new skills, enhance existing abilities, provide quality education, and conduct meaningful research.

Conclusion

Without doubt, we are witnessing rapid changes in academic research and teaching. Time of uncertainty is forcing us to rethink pre-pandemic research activities and teaching practices and to envision creative and effective ways to move forward. As pointed out earlier, current times of uncertainty represent a global challenge that we can address only through a joint effort.

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The Implications of Physical Distancing during Covid-19 for Education Researchers

Abstract

Physical distancing, isolation and an absence of face-to-face meetings with participants and respondents, as ramifications of the current Covid-19 pandemic, have an adverse effect on research projects, research processes and data generation. Furthermore, researchers' professional development and career prospects are seriously hampered, most notably those of early career academics. These predicaments considerably outweigh the admitted positive effects of the pandemic on research endeavours. The literature sources consulted were published in 2020 and 2021. This paper therefore can merely claim to reflect an early 2021 cross-cut of the rapidly developing pandemic and its influence on higher education, and specifically research. This paper represents a scenario where the focus has shifted from the 2020 lockdowns and travel restrictions to the 2021 vaccination period. It explores the implications of physical distancing – the relative absence of unhindered personal contact – in the sphere of research in general, and especially research in education contexts. A literature survey generated several insights from scholars worldwide, while personal experience also forms part of the discussion.

As indicated by the literature, researchers have to make the most of the current virtual communication during data generation, conferences and interaction with colleagues and fellow project participants. I trust that vaccination will soon ensure that physical distancing will become unnecessary during research and on the campus.

Keywords: physical distancing, social distancing, isolation, professional development, data generation, virtual contact, technology usage

Introduction

Offord (2020) cites social neuroscientist Stephanie Cacioppo who stated: "We're a social species", she says "We really need others to survive". The isolation and physical distancing associated with Covid-19 is a well-known phenomenon and most people experience it as the new normal (Nutten, 2021). In the process many people adopted coping strategies and embarked on alternative ways of communication. In the period of time since most countries went into a hard lockdown, it became clear that the pandemic has led to a large number of negative consequences. The adaptability of humankind has been tested like seldom before, and not everyone has coped equally well with the new challenges.

In the context of research and the lives of researchers in higher education, very specific new challenges had to be dealt with. In both the natural sciences and humanities considerable adaptations had to be implemented just to proceed with planned research activities. Through the threat of being infected with the virus, the first semester of 2020 marked the start of a sudden, unexpected abandonment of all

direct, unrestricted personal contact. “The social distancing norms were particularly disruptive and made the experience unique” (Sikali, 2020, p. 2435).

Types of contact that were the order of the day in the previous dispensation, were instantly barred and forbidden. Most academics were forced to switch to a virtual style of communication in both social and formal contexts. Closed campuses and a working-from-home life became the norm. Schiffer and Walsh (2020, para 1) pointed out that “… the impact of social distancing on the actual process of research has not been carefully evaluated or even broadly acknowledged”. The real effect of the lack of personal, face-to-face contact is yet to be determined, but from my point of view there are already clear indications that no online, telephonic or other kind of virtual communication can fully compensate for the absence of personal contact. Admittedly, the pandemic also brought about a number of advantages and new opportunities.

This paper explores the implications of physical distancing – the relative absence of unhindered personal contact – in the sphere of research in general, and especially research in education contexts. A literature survey generated several insights from scholars worldwide, while personal experience also forms part of the discussion that follows. It should be noted right from the outset that most statements, perceptions and research related to the pandemic and its influence on people’s lives is outdated the very next day after it has been written. Similar to the literature sources that were consulted, published in 2020 and 2021, this paper therefore can merely claim to reflect an early 2021 cross-cut of the rapidly developing pandemic and its influence on higher education, and specifically research. The literature review this paper is based on represents a scenario where the focus has shifted from the 2020 lockdowns and travel restrictions to the 2021 vaccination period. Despite all measures put in place, the future for all countries and people stays vague and uncertain.

The well-established term, social distancing, is a somewhat misleading and even unfortunate choice of words. The term physical distancing could have been better. The underlying principle is to keep a safe distance from others, normally 1,5 m, in social or public surroundings. “The measures may involve closing partially or wholly social activities including business, transport, among others that may enhance social contact and propagate spread” (Musinguzi & Asamoah, 2020, p. 2). The World Health Organisation (WHO) in partnership with the United Nations Children’s Fund (UNICEF) warned against a possible misunderstanding:

> *… the term social distancing has created some misunderstandings as some people mistakenly believe that the term social distancing means, changing your relationship status with people or that we need to be separated from family and friends. Due to this misconception, the WHO have begun to use the term “physical distancing”.* (UNICEF, 2020; Musinguzi & Asamoah, 2020, p. 2)

In this paper, the term physical distancing refers firstly to distancing between people that are in each other’s presence, which makes a face-to-face conversation possible, while adhering to regulations that specify a distance of no less than 1,5 m. However, physical distancing in this paper primarily refers to researchers being physically isolated from both fellow researchers and participants in their studies. Campuses are semi-closed, and academics are encouraged to work from home, an approach which in many contexts has become the norm and prevents the majority

from face-to-face contact with colleagues. Strict safety measures implemented at schools, bar or discourage education researchers from entering the premises and conduct interviews with educators or other possible participants.

Implications of physical distancing for research projects and data generation

Within the higher education context, the impact of physical distancing on research is also valid in the teaching and learning context. Most higher education institutions have switched to exclusively online teaching, or a hybrid model with limited personal contact parallel to online teaching. To most academics and students online teaching is nothing new, as is virtual contact with participants and respondents in research activities, for the purpose of data generation. The most notable difference associated with the pandemic is that personal, face-to-face contact has become loaded with risks of possible infection by the virus.

A number of implications for research projects, data generation and research ethics will next be discussed, after which the focus will switch to the implications of physical distancing for researchers.

Livingstone-Peters (2020, para 23) warned that important research questions that deserve scientific scrutiny "cannot simply disappear just because we have a Coronavirus pandemic at this current moment". Key research questions obviously do not only refer to matters associated with the pandemic, but also to burning issues that existed prior to Covid-19. Livingstone-Peters (2020, para 23) added that researchers have to be pandemic prepared and adapt their methods and approaches on a permanent basis. These scholars foresee further similar disruptions, even new pandemics, that will hit society.

Despite certain evident disadvantages, a virtual or online approach (at least on technological level) does not create serious problems in First World contexts, where internet connections are stable and fast, cell phone connections are constantly available, and the vast majority of people are computer literate. In contexts where this is not the case, as in remote areas and Third World countries, the challenges for both teaching and research are much more prevalent and influential. As Prata-Linhares et al. (2020, p. 1) stated, the pandemic offer

> *[an] enlarged reproduction of pre-existing educational asymmetries. People who live in a situation of social vulnerability and digital exclusion are facing many more difficulties in the isolation period, as well as in managing to keep learning, than those in better financial conditions and with broadband internet access.*

The challenges associated with often failing technological connections adversely influence both researchers and potential participants or respondents. On his ResearchGate blog, Marinkovic (2020) gave researchers the opportunity to reflect on the impact of the pandemic on their academic and research activities. One Namibian researcher, working amongst indigenous people in terms of education, reported that participants' lack of access to technology hampered the inquiry significantly. Marinkovic (2020, para 5) adds: "Although one could successfully complete a series of interviews, the nuances that are often evident in face-to-face meetings go amiss when communication technology is utilised".

In contrast to abovementioned technological challenges of Third World contexts, Jørgensen and Claeys-Kulik (2021) focused on First World countries and describe the expected changes and a redefinition of priorities of European universities. They envisage that these universities' nature and structure will be "hybrid, combining physical and virtual spaces in a holistic learning and research environment that accommodates the needs of a diverse university community" (Jørgensen & Claeys-Kulik, 2021, para 7). In First World contexts, researchers meet the challenge to not being allowed to conduct face-to-face interviews "by learning new tools and digitalizing the data collection process" (International Science Council, 2021, para 5). In the absence of reliable technological contact between researchers and participants, as is experienced in most Third World contexts, no empirical research can take place. Alternatively, data will be generated by means of personal contact while adhering to the standard Covid-19 preventative rules such as physical distancing, sanitising and wearing of masks. This is only possible where such access is approved by rightfully cautious authorities.

All rural areas and all less affluent communities are not necessarily devoid from internet access. Ganesan (2021) describes the positive effects of one successful project in rural India. The AirJaldi project, in collaboration with the Microsoft Airband Initiative, established fast, reliable broadband internet access to the people in rural India. The inhabitants of the remote village called Churni previously had extremely unreliable Internet, but could recently break out of their relative isolation, and can now (through the involvement of a services centre) connect with government officials, higher education institutions and researchers. Still, "only half of India's 1,35 billion people have reliable Internet access" (Ganesan, 2021).

Above scenario might be an indication of the general situation in most poor, Third World communities. Firstly, there are those relatively few areas where the internet is available, stable and fast, but only located in certain reachable offices, and not in peoples' homes. Livingstone-Peters (2020, para 15), reporting on the African situation, pointed out that "Zoom and Skype meetings are a luxury – something that many households in these regions do not have and cannot afford". Secondly, areas exist where internet is available in special offices, however, it is not reliable. Lastly, there are vast areas where no internet exists. Typical to all three scenarios mentioned above is the fact that very few people in such circumstances have developed the necessary computer skills to participate in on-line data collection. An important requirement in empirical research that is hard to meet, is that of confidentiality during data generation. A computer literate facilitator has to become involved, and especially in a village context it can be expected that all responses might not convey the honest opinion of a participant.

Cell-phone networks are widespread, and its affordability ensures that people with low incomes can also be reached, even in remote areas. Cell phone contact ensures a much more viable option for virtual contact between researchers and participants. One participant on the blog, Xenny Brown, (Marinkovic, 2020, para 5) encourages cell phone contact, "which have been a boon to those who need to speak to multiple participants". Through use of cell phones researchers can break through the connectivity barrier, avoid the risks associated with the pandemic, and make the voices of marginalised individuals and groups heard. Creative ways will have to be developed to ensure connections, even where participants have outdated handsets on

which applications that are taken for granted in First World contexts are not practicable.

The use of cell phones is a viable solution of breaking through isolation and counter the absence of face-to-face contact. It is, however, regularly experienced that text messaging "cannot accurately convey tone, emotion, facial expressions, gestures, body language, eye contact, oral speech, or face-to-face conversation" (Anon, 2021, para 4). In social contexts, messages often get misinterpreted or misunderstood. In the research context, where accurate data, reliable findings and trustworthy conclusions are essential for quality research, a negative ramification of cell phone communication with participants is that data integrity cannot be ensured.

Implications of physical distancing for researchers

In February 2021 about 1,5 million people in South Africa have tested positive for the Coronavirus, and the death toll is approaching 50,000. Worldwide 2,4 million people have already lost their lives since the start of the pandemic. The physical danger associated with the spread of the virus is therefore obvious, and all researchers who consider it necessary to get into closer physical contact with participants, run a high risk of being infected.

In their research about the impact of physical distancing on the process and outcomes of research, Schiffer and Walsh (2020, para 1) refer to

> *a new mode of research, one in which masks and strict social distancing are mandatory. Naturally, the challenges for researchers who are touched directly by the disease and those with significant health risks can also be especially difficult, and many others are feeling the impact on their mental health.*

The human, social element associated with personal contact has been an integral characteristic especially of qualitative research, mostly during face-to-face interviews. Schiffer and Walsh (2020, para 3) describe research in higher education, and specifically in the fields of Science, Technology, Engineering and Mathematics (STEM) as "almost always a collaborative social process". They add that, when physical distancing has to be maintained, the essential collaboration "is being shaken to its very core". In cases where researchers amongst themselves, or researchers in interaction with their participants or respondents, have to maintain such a distancing to prevent health risks, there are several clear implications for researchers, as will be discussed.

Planned discussions as well as impromptu meetings with colleagues on campus currently do not happen, except in rare cases. Working from home can be seen as an isolating factor, with several detrimental effects such as limited intellectual stimulation, "suppressing the serendipitous formation of collaborative ideas" (Schiffer & Walsh, 2020, para 8). Hindered peer group interaction and development of relationships that can have a damaging impact on the quantity and quality of research outcomes. As reported by Marinkovic (2020, para 5), one female researcher on a ResearchGate blog points out that "responsibilities at home is reducing the productivity of the work". On the positive side, another scholar on the Marinkovic blog, who does not spend time on transport to campus any more, states that working from home "has provided me with a little more flexibility to do my job, while maybe saving me a little time that I can direct at doing research". He even admits that he can "do various work tasks in remote meetings" (Marinkovic, 2020, para 6).

Virtual conferences have become the order of the day and in the absence of personal contact, certain valuable sequels of such meetings are currently lost, mainly related to the non-formal element of such gatherings of scholars. No online conference can compensate for those valuable interactions between sessions, where networking can take place and where further collaboration is contemplated. Such interactions provide a space to conceptualize highly productive projects.

Referring to the Leading Integrated Research for Agenda 2030 in Africa (LIRA) programme in Sub-Saharan Africa, Livingstone-Peters (2020) points out some implications of the pandemic for early career researchers in this program. Currently, one prominent drawback is the relative lack of funding for research projects within the LIRA programme. One LIRA grantee hopes to find funding for continued research after completion of the current project (Livingstone-Peters, 2020, para 10), "but is concerned about funding cuts as we move into the post-pandemic phase".

Having to resort to virtual conferences, young researchers miss opportunities of meeting established scholars in their fields, and the so much-needed professional networking is limited (Schiffer & Walsh, 2020, para 4). Researchers have to cope with a phase in their professional careers where mobility is severely restricted. Livingstone-Peters (2020, para 11) voices the concern of young scholars who are not considered for lecturing positions or promotion to other universities, due to the pandemic related decline in the economy.

There are positive ramifications and new opportunities for researchers. Several scholars point out certain advantages associated with the pandemic. Looking at the implications of the pandemic from a German perspective, Gardner (2021) puts the current situation as follows:

> *To mitigate the impacts of the coronavirus crisis in this area, the CSH calls for new tools to maintain and promote international cooperation which maintain a balance between physical and virtual exchange.*

Referring to Germany's Council of Science and Humanities or CSH (Wissenschaftsrat), which has published a policy paper regarding the country's higher education and research system, Gardner (2021) pointed at the fact that certain flaws existed prior to the pandemic. This includes, in the field of medicine, the slow translation of health research results into advancement of healthcare. Other deficiencies identified by the CSH are the "need for more cooperation within the European Union" (Gardner, 2021, paras 11-13), and weaknesses in communication regarding scientific findings between scientists and the public at large. Gardner (2021, para 2) therefore regards the pandemic, that has "shaken many certainties", as an opportunity for a "fundamental resetting of the higher education and research system".

One observation of a change from a frustrating situation to a better dispensation relates to the period from article submission to eventual publication. Especially in medical research and health sciences "the intensity and volume of research related to COVID-19 has been unprecedented and governments and funders around the world have been calling for rapid and open sharing of research the outputs" (Shearer et al., 2020, para 6). The publication of COVID-19 related papers have been greatly speeded up compared to the norm. Shearer et al. (2020, para 7) referred to concerns regarding quality control of publications "because of the speed with which research outcomes are being shared". They added, however, that "widespread openness can

lead to increased scientific scrutiny and more rapid identification of inaccurate research conclusions. This shows that quality assurance can be implemented in such an environment." I trust that this new trend, as one positive corollary of the Covid-19 pandemic, will set the tone for accelerated publication in other fields as well, such as education.

Conclusion

In this paper it is argued that physical distancing, isolation and an absence of face-to-face meetings with participants and respondents, as ramifications of the current Covid-19 pandemic, do have an adverse effect on research projects, research processes and data generation. Furthermore, researchers' professional development and career prospects are seriously hampered, most notably those of early career academics. These predicaments considerably outweigh the admitted positive effects of the pandemic on research endeavours.

It is clear that the researcher has to make the most of the current virtual communication during data generation, conferences and interaction with colleagues and fellow project participants, trusting that vaccination will sooner rather than later ensure that physical distancing will become unnecessary during research.

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Students' Perspectives regarding (Dis)advantage on Making Choices about Universities to Enrol in: A South African Case

Abstract

Although engagement of the low-income students increased since the introduction of inclusive policies in the post-apartheid higher education in South Africa, inequality of access, participation and achievement still persists. While focus has been on increasing enrolment and addressing students' concerns in universities, little attention has been dedicated to exploring student (dis)advantage when making choices about a given university. This study aims to understand the opportunities that students from diverse socio-economic backgrounds have in making choices about the universities they wish to attend. Using the capability approach the findings of this study show that when students have the opportunity and agency to make informed decisions about university selection, they are able to follow their desired educational and career goals and become advantaged. This qualitative study draws from semi-structured interviews from 26 final-year undergraduate and honours students from one South African university. Findings show that despite of students' aspirations, the low-income students' abilities to make informed decisions were constrained by the circumstantial factors particularly the interplay of lack of financial resources, support and information, and failure to meet the required entry requirements, which imply disadvantage. By a way of contrast, middleclass students' decisions were based on their long-term plans and were reflective of their rational choices pointing to advantage. While universities might not be able to address some of the reported challenges, the study offers some recommendations for universities and schools to consider as a way of improving students' inclusive access to universities.

Keywords: access to higher education, equality, selecting university, inclusivity in education, South African higher education

Introduction

The post-apartheid democratic governments in South Africa engaged the historically excluded groups to redress inequality of access into higher education. This resulted in an increase in the enrolment of students into universities from 500 000 in 1994 to 1 085 568 in 2018 (DHET, 2020, p. 15). Notwithstanding this progress in absolute numbers, participation of black students is still lower than the white students, which is 16% and 50% respectively, against a national average of 19,1% (Council on Higher Education, 2018, p. 3). Coupled with that, black students continue to have lower educational outcomes as 5% of high school graduates attain a bachelor degree compared to 25% of white students (South Africa Market Insights, 2020). These figures suggest that students could be experiencing challenges in their transition from schooling into universities after enrolment in universities. While race is used in addressing and monitoring progress made in reducing inequality in South

African higher education, it appears that class has become the main factor disadvantaging some students (Spaull & Jansen, 2019).

So far, much of the focus within scholarly literature has been on addressing disadvantages of the black students (majority coming from low-income backgrounds) through admitting those with lower-entry academic qualifications, supporting them through foundational and academic support programmes, and providing them with funding (Department of Education, 1997). However, little attention has been given to students' choices of given universities and the degree programmes they enrol in. This study explores if students from diverse socio-economic backgrounds are able to make effective choices about enrolling into universities, which is crucial for them to pursue their educational and career goals, and for social mobility (Walker, 2020). While unemployment is high in the country, attaining a degree increases their chances of securing a job over those with high school qualifications. For example, unemployment for youth (ages 25-34) with university degree is 12,9% and 32,4% for youth with a high school qualification (Statistics South Africa, 2019). Failing to make informed choices about universities might result in some students not enrolling at all or dropping out early in the process.

Literature review

A review of literature concerning access into higher education in the UK, USA and Australia reveals that student's choice of universities is mainly influenced by social class (Archer et al., 2003; Shiner & Noden, 2015). These studies show that the low-income (ethnic minority) students have limited opportunities to make decisions about given universities due to factors such as limited finances for university and lack of information. In the context of South Africa however, it appears that there is limited research on students' choices of universities. Van Broekhuizen, van Der Berg and Hofmeyr (2016) show that type of school attended, race, gender, age and grade 12 qualifications play a role in students' choices about selecting particular universities. Family and university are also some of the factors (dis)enabling students to make decisions about access into universities in South African higher education (Walker, 2020). Additionally, a lack of funding, an uncertainty of receiving the bursary before the application is approved as well as a delay in the disbursement of the funds, for example through the National Student Financial Aid Scheme (NSFAS), could prevent the low-income students from making effective choices (Gore, 2020).

The capability approach

The capability approach was adopted for this study because of its focus on individual students' opportunities and its ability to connect individual diverse socio-economic backgrounds to make choices about universities (Robeyns, 2017). Underpinning the capability approach are *capabilities*, *functionings*, *agency* and *conversion factors*. *Capabilities* are opportunities that individuals have (i.e. enrolling into university) while *functionings* are achievements made from such opportunities (for example graduating, having employment skills) (Robeyns, 2017, p. 9). For a student to make decisions and act to achieve their educational goals,

they require *agency* (Sen, 1999, p. 18). However, the capabilities and agency are affected by the *conversion factors*, which are the personal, social and structural factors (dis)enabling students to make decisions. Put together, this study perceives students as disadvantaged when they have limited opportunities and agency to make informed decisions about selection of universities in order to pursue their educational and career goals. This study, therefore explores the conversion factors on how they provide and limit student opportunities and agency to make genuine choices about certain universities and the degree programmes.

Methodology

The study draws from data obtained from 26 honours and final-year undergraduate students (61% females) in four faculties at one historically white university in South Africa. While the different faculties were chosen to ensure diversity, the rationale for selecting the final and honours students is based on their ability to critically reflect on their decisions in the context of the experiences they have at the university. Qualitative data were collected from these participants using semi-structured interviews conducted in person. The audio-recorded files were fully transcribed to allow for open and conceptual coding. Some of the developed codes are: schools, universities, family, low-entry points, inadequate finances, reputation of the university, passion, and emotion. The categories of data identified from open coding were merged to form subthemes and these were subsequently combined into themes. All the ethics were strictly upheld throughout the study. Participant voices will be used in the presentations of findings while pseudonyms (in bold) were used to maintain anonymity of the participants. The main limitations of this study include that the findings are based on a small sample size as well as a fairly successful group of students which excludes those who dropped out of university. The findings may however still be helpful in thinking about ways of improving student choices on enrolling into university.

Conversion factors (dis)enabling students' choices of universities

The results from the student interviews reveal some interpersonal variations in students' abilities to make choices based on their middleclass background (reported family income between ZAR 550 000 and ZAR 1 000 000) and low-income background (family income between ZAR 35 000 and ZAR 370 000 per annum). Students whose parents were civil servants (e.g. teachers) were also considered as low-income background because their parents struggled to pay tuition and university expenses, yet their children were excluded from accessing NSFAS funding. The NSFAS inclusion criteria was however reviewed from a family income of R 122 000 per annum and below to R 350 000 and below per annum when the free higher education policy was introduced in 2018. The following conversion factors emerged from the collected data.

Schools, universities and family

School type, university and parents emerged as conversion factors through failure of low-income students to access useful information on the institutions to

enrol. While teachers did not provide helpful information about universities, the schools did not have some arrangements for the learners to attend the university open days for career guidance. This resulted in only a few students being able to receive information through the university open days. Even after visiting the universities, students still could not access adequate information about the degree programmes to study. **Botle** enrolled for the Education degree programme that she did not want despite her qualifying for a Business Studies degree programme that she had wanted.

> *I only received information about education at the university open day. If I had got enough information, I was gonna choose something related to the commercial subjects I was studying in school. If I had known, I was gonna choose something from the commercials and specialised lets say in human resources or marketing.* (**Botle**, Female, Low-income background, Honours in Education)

Despite some of the low-income students having family members who had attended university, two students indicated to have dropped out of university as a result of lack of information. **Mulalo** dropped out from two universities where she was enrolled for Agricultural economics and Bachelor of Commerce in Accounts. She finally settled for Agriculture economics at a different university. It is evident that inadequate information led the student to make choices that were later reviewed and changed. Schools however were enabling for the middleclass students who received helpful information for making informed decisions. **Thandaza,** a female student enrolled in Business Studies, indicated that she received most of the information she needed through a school counsellor and this helped her to choose a university and degree programme she valued.

The middle-class schools, which charged high fees, employed professional counsellors and invited former learners who were enrolled at universities to improve the learners' awareness about university expectations. Even though the students ultimately exercised their choice of desired university and degree programme, what emerges is that parents were also involved in the decision-making process. Moreover, the middleclass students benefitted through having access to the first-hand information from parents, siblings and family friends who had some experiences of universities. Meanwhile, it was common among the parents of the low-income students not to be involved (even when they were also university graduates), a few parents made decisions on behalf of the students, which resulted in the students being unable to exercise their agency and decision-making. **Rethabile** who wanted to enroll at a university away from her home town was forced by her mother to enroll at the local university for a Psychology degree programme regardless of her wish to enroll for a Law degree programme at another university in a different province. Clearly, **Rethabile** may have desired to live independently but did not have the opportunity and resources to make a choice. Lack of opportunities to make decisions were exacerbated by the discouraging messages the low-income students received from people in their communities. **Thabang**, a male studying Bachelors in Education, was advised to look for a job and start a family. This perception could be reflective of the low educational aspirations some high school graduates had, who ended up not enrolling for university education.

Low-entry points and inadequate finances

The interviews reveal that most of the low-income students ended up studying their degree programmes by default realising that their school qualifications could not meet the minimum entry requirements for the universities. This is partly attributed to the poor-quality education that low-income students receive from the non-fee charging public schools (Gore, 2021). Furthermore, lack of finances constrains most of the low-income students to plan, make choices and enrol in the desired universities and degree programmes. **Tshidi**, who had qualified for the Social Work programme that she wanted, ended up studying Bachelor in Education at another university because the bursary she was awarded required her to do so.

> *I didn't really choose that degree programme. I had to study Education because the bursary funds that degree.* (**Tshidi**, Female, Low-income background, Bachelor of Education)

Tshidi's freedom and agency to make a choice was therefore limited due to insufficient financial resources, which consequently forced her to settle for the degree programme that she did not desire but that she had already secured the funding for. In some cases, low-income students studied at the university for the reason that it was closer to their homes which would reduce the university costs. Therefore, some low-income students made decisions based on what was pragmatically possible during that time disregarding their long term plans, preferences, as well as educational and career goals.

Reputation of the university, passion and emotion

While financial considerations were made by the middleclass students, funding was not the underlying factor in their decision-making process as other reasons were more important. The reputation of the university was a critical aspect considered by the middleclass students as mentioned by one of the participants.

> *I think the Agriculture Faculty here is one of the best faculties in the country. So it was a reasonable and easy choice to make. I am proud to be graduating from this university.* (**Gernus**, Male, Middleclass background, Honours in Agricultural Economics)

The last quote reveals that a rational decision was made based on the reputation and the prestige one would gain through graduating from the university. Apart from that, most of the middleclass students reported that they chose the degree programmes because they had a passion for a specific subject. Enrolling at the university had some emotional value to the students whose family members have graduated from that same institution. Middleclass students had the opportunity and agency to make choices which demonstrates advantage.

Discussion

The above results demonstrate a complicated picture of advantages and disadvantages in students' abilities to make choices as both material and non-material factors intersected with individual biographies. This study shows that most low-income students' choices were primarily determined by the circumstantial factors (the need to fulfil immediate needs, complex family and funding

arrangements, and low university entries qualifications) which disadvantaged them. The low-income students ended up enrolling at any university and for degree programme that they were offered. The institution's reputation, to maintain status, passion for the degree programmes and emotional attachment to the institution underpinned the middleclass students' decisions, which augments the findings from Walker's (2020) study. Findings in the present study also correspond with Hart's (2012) assertion that middleclass students are able to make rational choices to fulfil their long-term career goals implying advantage. The findings in the present study have policy implications for the South African government to also address student disadvantage during schooling and during the transition of the low-income students from schooling into universities. It is fair to assume that most of the challenges students experience are structural and historically rooted hence universities might not be able to address them on their own (Gore & Walker, 2020).

Conclusion

This study has revealed the unequal opportunities between middleclass and low-income students in making choices of universities. To this end, the study offers the following practical recommendations to help address disadvantages experienced by students in the South African higher education. To strengthen the link between schools and universities, universities should intensify their outreach programmes in schools while schools could offer career guidance information early enough so that students are assisted to choose subjects that will allow them to follow their desired degree programmes. This could also be achieved through schools recruiting trained personnel to help with identifying students' talents and to offer information about the career and funding options in a more simplified and individualised manner. Schools should also consider to engage with low-income communities to raise aspirations of the low-income students as a way of increasing their enrolment into universities.

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Reorienting Art Teacher Education Pedagogy towards Learner Empowerment during COVID-19 Restrictions

Abstract

Due to the COVID-19 pandemic lockdown restrictions, open and distance learning (ODL) has become the preferred delivery model of instruction at most institutions of higher learning. The ODL mode of instruction has become the most common alternative even for art teacher education amidst numerous practical challenges. This conceptual paper argues that the reorientation of art pedagogy in ODL changes learning and teaching habits of art practical content providing independent critical thinking as well as a new appreciation of learners' intellectual, emotional and social involvement in learning. The paper recommends critical art pedagogy as a pedagogy that develops critical skills and generates emancipatory and transformative patterns of teaching and learning art. This could inform both theory and practice as well as relinquish the lecturers' authority in traditional face to face teaching. Critical art pedagogy could address the dilemma faced by many institutions during this COVID-19 era in their desire to engage and empower art student teachers.

Keywords: critical art pedagogy, critical thinking, gallery narratives, contemporary art, open distance learning, open data resources

Introduction

Many institutions of higher learning across nations were forced to adopt the ODL model of instruction but still grapple to integrate it into practical disciplines of their curricula such as art. ODL has not been easy for practical art modules such as drawing, painting, and sculpture. The major challenges with implementing practical modules through ODL include the struggle to implement and monitor the demonstration as well as the development and acquisition of skills without physical contact. ODL has become inevitable and necessitated the adoption of new strategies to critically engage open distance learners to optimise individual learning. ODL provides opportunities to learn within an open academic and social environment which has been inundated with numerous open data resources such as contemporary public artworks and gallery narratives (Dziwa, 2018). Resorting to ODL creates the opportunity to reorient art pedagogy and the potential to access and use open data visual resources. This paper interrogates the efficacy of critical art pedagogy in ODL.

Background

COVID-19 (C19) has severely challenged the global health landscape and education systems. C19 is a communicable respiratory infection caused by the coronavirus which originated in Wuhan, China in October 2019 and spread throughout the world. Since January 2020, C19 accounts for over 40 000 deaths both

in Zimbabwe and South Africa and over two (2) million deaths globally (*Covid-19 Alert*, February 2021). The World Health Organisation (WHO) has declared C19 a pandemic and drastic measures such as quarantine, restricted movements, and minimised gatherings have been implemented to reduce the spread of the virus. Due to restricted human contact and interaction in education, the ODL mode of teaching and learning replaced the contact mode in most institutions. Therefore, this paper focuses on the need to reorient pedagogy in art as a practical subject toward using the ODL mode of instruction while continuing to provide high-quality technical education.

There are several challenges faced in the practical aspects of art pedagogy through ODL (Pityana, 2009). These challenges include the restriction to only watch demonstrations without being able to touch and feel the materials used by lecturers; the uncertainty of the authorship of the artworks produced by learners who are not being monitored; lack of immediate lecturer-learner feedback that could help validate the practical processes such as that provided for in contact learning. However, pragmatism philosophy has guided the practical orientation of art for several decades and became an important objective of the subject (Eisner, 2002). Regrettably, the global health restrictions have rendered contact learning impossible. The major problem deterring implementation of practical subjects in ODL remains on how can lecturers ensure that learners have authentic practical engagement in an open distance pedagogy.

Critical theorists such as Paolo Freire (2000) and Henry Giroux (2011) have critiqued passive educational systems and pedagogies. They advocate for democratic social transformation. For Freire (2000), emancipatory education involves subverting the Hegelian master/slave dialectic, in which oppressed individuals undertake a transformation from object to subject, and thus properly become the subject. Hubard (2007) argues that traditional contact learning errs in neglecting the role of the students in shaping and reflecting on their encounters with art because of too much prescription of work. Most contact learning tends to be teacher dominated while in ODL learners can actively participate in their education through critical pedagogy engaging with contemporary artworks and gallery narratives from their localities. The engagement provokes learners to form compelling interpretations through thoughtful processes (Hubard, 2011). Engaging with familiar artworks that are within their socio-cultural contexts is an avenue for learners to simulate and encourage themselves toward empathetic reflection, meaning-making, creativity and empowerment.

Thus, ODL offers vast opportunities for students' autonomous learning from open data resources available in their socio-cultural environments (Atenas, Havemann & Priego, 2015). Guided by this background, this conceptual paper explores the efficacy of reorienting pedagogy in ODL to engage learners with open data resources that can afford critical thinking which facilitates learner empowerment through individualized practice, creativity, and self-directed learning. This is envisaged as the suitable pedagogy for teaching practical skills through ODL

This paper argues that adopting critical art pedagogy in ODL could create a platform that demystifies most challenges associated with teaching the practical modules of art education through ODL. The purpose of this paper is twofold. Firstly, it seeks to demonstrate the efficacy of reorientating pedagogy emphasizing the role

and viability of public contemporary artworks and gallery narratives as open visual data in enhancing critical art pedagogy, and secondly, it seeks to elucidate the relevance of critical thinking in providing an enabling space and developing autonomous and critical art teachers in ODL. Questions to explore are:

- What do ODL students gain through their encounters with open visual data?
- What kinds of understandings, meanings, or practical experiences will they have access to along with critical thinking skills through using the ODL mode of instruction?

Therefore, the main aim of this paper is to motivate an ODL critical art pedagogy in art teacher education whose focus goes beyond critical thinking in the development of theoretical and practical skills.

Theoretical and conceptual framework

This paper is hinged on the critical theory framework by Henry Giroux (2011) and the intersection of critical pedagogy, open data resources, and open distance learning forming the conceptual framework adopted. The critical theory originated from the Frankfurt School (Shor & Pari, 2000). Critical theory is an apt framework in guiding this paper which encourages independently-minded learners such as those in ODL who need transformation by questioning the status quo and engage explicitly with questions of truth, power and justice from open visual resources to inform theory and art practices. The conceptual framework adopted from critical pedagogy represents a synthesis of critical theory (through critical engagement with visual narratives) and instructional methodology such as ODL. The intersection entails that the aims of transformation can inform pedagogy and practice (Shor & Pari, 2000). Critical art pedagogy aims to encourage independent learners who critique the status quo through visual narratives and engage explicitly with questions of generating truth, autonomy, and learner empowerment (Shor & Pari, 2000).

ODL: Functions, praxis and departure

Open distance learning refers to a delivery mode or teaching and learning approach which focuses on access to education without physical contact with lecturers (Farrow, 2017; Pityana, 2009). Contact learning is characterised by face-to-face interaction, contact time-tabling, venues, and space for learning. ODL eliminates such challenges because it is an online learning strategy. Learners are flexible to refer to and use life examples prevailing in their contexts. ODL gives the learners autonomy and authority to determine knowledge generation at their own pace and convenience as learning is done from within the learners' cultural context (Pityana, 2009).

Through contact learning, knowledge is normally imposed overtly upon students or covertly via the subtle interactions of the 'hidden curriculum' (Hellman & Ulla, 2019). Classroom pedagogy maintains boundaries between content and the teacher who has control over the selection, organisation and pacing of knowledge transmitted and received. Leong (2005) argues that classroom pedagogy serves the technical and hermeneutic knowledge-constitutive interests which contribute to the reproduction of the societal status quo. Emancipatory knowledge constitutive

interests are not accounted for by the contact model of learning but rather in the ODL model (Pityana, 2009).

Open data resources and critical pedagogy

Open data resources (ODR) can be understood as data that are universally available for anyone without boundaries and restrictions (Atenas, Havemann & Priego, 2015). Dziwa (2018, p. 2) mentions that many classrooms, lecture halls, media and texts (printed or electronic) abound and contain varied visual information. The affordances inherent in visual artworks are certainly worth exploring to establish how these can be used to support teaching and learning in ODL within the communities which house them (Alexander & Schlemmer, 2017). Contemporary activist artworks and gallery narratives are effective data sources for critical art pedagogy in ODL. These are created from real life researches and experiences by practising artists (Dziwa, 2018; Hubard, 2011).

Contemporary artworks and gallery narratives are not constrained by licensing conditions and proprietary environments. For example, public murals, public statues, gallery exhibitions or narratives and graffiti are openly available to the public as contemporary artworks. Graffiti includes the words or drawings that are scratched or scribbled on a wall as murals which include figurative images (Belton, 2001). Such data could improve the art learners' experience as it reduces the friction between the stakeholders of owner's rights and facilitates collaboration between artists, academics and learners as viewers. The contribution to the scholarship of open data resources in art such as gallery narratives and contemporary artworks, as research references and as citeable outputs, is still very limited to academics and students, hence the relevance of this article to ODL in art teacher education (Leong, 2005).

Engaging learners with visual artworks, analysing, citing, and reusing the images is a means how lecturers could flip their instruction to facilitate independent research, teamwork, critical thinking and critical data analysis skills (Leong, 2005; Shor & Pari, 2000). Critical pedagogy addresses the inequalities and differentials of power in and through education and ultimately, focuses on the empowerment or emancipation of individuals and communities (Freire, 2000). Critical art pedagogy is an educational theory that empowers the critical awareness of the learners about the oppressive nature of society through artworks (Shor & Pari, 2000, p. 129). It examines the radical theories, beliefs, and practices that contribute to emancipation and democratic schooling through visuals. We envisage that a critical art pedagogy approach could be used to underpin the development of educational activities based on the use of open data resources from contemporary artworks and gallery narratives.

Engaging with open visual data resources in ODL

Shor and Pari (2000) observe that critical pedagogy informs critical thinking skills as well as expressive practice for any form of art, including drawing, painting, and sculpture. Thus there is no limitation of art content that can be included in ODL. Critical pedagogy in this sense does not only provide important thoughtful and intellectual competencies but also enables learners to effectively engage action and skills manipulation (Giroux, 2011). Thus, critical art pedagogy provides space for

democratising and reconstructing art education knowledge which solves practical challenges in society.

Through critiquing visual data from society, students develop research and literacy skills as well as critical thinking skills. These are opportunities that come along with critical pedagogy. Leong (2005, p. 9) suggests that learners as viewers use their critical thinking skills through criticism and dialectical thinking. Contemporary art does not only contribute to the production of cultural knowledge but also influences how we imagine our community and ourselves. Thus, engaging learners with contemporary artworks establish ways for emotional engagement and collaborations amongst students and society (Atenas, Havemann & Priego, 2015). In inquiry learning, students construct and discover knowledge about theory and practice by asking questions like; how are the images created? How are the messages conveyed?

Hellman and Ulla (2019) suggest that artworks are uniquely positioned to engage and integrate multiple ways of knowing. To this purpose, tasks and assignments in ODL should be designed to invite students to observe contemporary artworks and gallery narratives, detect peculiarities, ask questions, infer meaning, probe for alternative explanations, form conclusions, offer evidence, and continually reflect on their understanding by working on personal projects as alternatives or another possibility of expression (Alexander & Schlemmer, 2017; Andrabi, 2013). Engagement should not end with observation and critique; it should lead to activism and practice. In this way, artworks can provoke viewers to form compelling interpretations, decisions and judgments through rational thought processes that inform practice (Shor & Pari, 2000). Experiences with works of art can simultaneously be conceptual and embodied (Andrabi, 2013). Atenas, Havemann and Priego (2015) conclude that being a critical thinker provides discourse and scholarship which identifies the crux of practical discourse.

Conclusion

From the literature, we concluded that, through engaging with artworks, there is a sense of immediacy in the way viewers begin to apprehend the world. Creative production of new artworks by the ODL learners is active when learners' critical judgment, interpretation, and meaning-making are provoked by observation and criticism of contemporary works available to them.

Critical thinking is fundamentally creative in the sense that it aims to produce a new level of understanding and something new. Creativity is not its competency but a product of thinking critically through observations, analysis, and dialectical thinking. Creativity benefits from recognising the role of critical thinking in projecting novel ideas and practice as situated reasoning (Hubard, 2017).

The use of visual images to encourage alternative and multiple interpretations is vital in ODL for critical conscientisation, the development of critical thinking and to inform practice. The artworks become the center of educational experiences whereby the learners actively interpret and act upon. Atenas, Havemann and Priego (2015) suggest that the potential of using original artworks to expand learners' knowledge parallels the exploration of critical pedagogy in art classrooms.

Recommendations

Education must enlarge the experience that thinking and reflection are central to the act of constructing knowledge and learning (Giroux, 2011). According to Shor and Pari (2000), critical art pedagogy offers a favourable ambiance where students can engage within the circumstantial and contingent conditions of the world. Critical art pedagogy in ODL is recommended as opposed to dominant conceptions of teacher dominated education and schooling. To sustain this, human resource development is the first recommendation we can make to facilitate the reorientation of art teacher education pedagogy in an ODL set-up. Every innovation requires an equal training and development program to ensure effective implementation. Lecturers need to be trained and to be prepared in module content writing, developing demonstration videos and designing instruction that promotes critical visual engagement for learners.

Universities and schools are recommended to avail information communication technology (ICT) resources to support communication channels. There must be secure communication channels available to send and receive information between lecturers and students. It is vital to keep lines of communication open from the lecturers to the learners and vice versa.

The assessment procedures do not remain the same as in the contact learning model. Portfolio assessment is also recommended as a key assessment method focusing on the process rather than the product. Assessment will be based on the systematic collection of a learner's work such as a finished product accompanied by drafts and sketches, and presentations that represent competencies, exemplary work, displaying learner's developmental progress.

Institutions are encouraged and recommended to ensure that learners have access to materials. Material resource provisions through the institutions remain critical and can be achieved through the following ways for ODL students:

1. Lowering the fees structure for ODL, hence affording them surplus disposable funds to purchase materials and equipment; or
2. Entering into MOUs (Memorandum of Understanding) with respective colleges and institutions around the country where students upon identification as a student of a partner institution are allowed to use the respective institutions' studios close to their homes.

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André du Plessis

Complexity Theory as Paradigm when Researching Education Reform: The South African Case

Abstract

In education systems there is inter-connectedness with multiple sub-systems which interact with each other. This paper argues that complexity theory is well suited as a lens to research education reforms. Key elements of complexity theory that are particularly useful are applied to the South African case. Aspects of complexity theory include: interaction of the elements which constitute an education system; feedback based on these interactions; the connectedness of these elements; the emergence of new properties and behavior based on the interactions and feedback; the contexts of the different elements of the system; and the non-linear nature of the causes and effects of educational reform. Complexity theory not only enables researchers to research education reforms from a whole system perspective, but also accommodates the dynamic nature of an education system.

Keywords: complexity theory, education systems, education reform, South African education system, education research

Introduction

In the South African education system, the elements or agents that constitute the system can be grouped into macro (national and provincial structures) and micro levels (local schools). Interactions among these elements happen both horizontally and vertically. For example, at the macro level, Section 9 of the National Education Policy Act 27 of 1996 (RSA, 1996b) determines that a Council of Education Ministers must be established, consisting of the Minister and Deputy Minister of the Department of Basic Education, and the nine provincial political heads of education (Members of Executive Council for Education). Also to attend the meetings of the Council, is the Director-General of the Department of Basic Education in order to report on the proceedings of the Council and to advise on any matter relating to the responsibilities of the Department of Basic Education. The chairpersons of the Portfolio Committee on Education in the National Assembly and the Select Committee on Education in the National Council of Provinces may also attend the meetings.

At the micro level there are the interactions between the different actors in the management structures, e.g. school management teams, and the governance structures of schools, e.g. the school governing bodies and their sub-committees. There are also statutory professional bodies such as the South African Council for Educators (SACE) which was established in terms of the South African Council for Educators Act 31 of 2000 and the Education Labour Relations Council (ELRC) which was established in terms of sub-section 37 (2) of the Labour Relations Act 66 of 1995. The Parties to Education Labour Relations Council are (ELRC, 2016, p. 7) the State as Employer through the collective made up of the provincial departments

of education and coordinated by the Department of Basic Education; and the teacher unions, which include the South African Democratic Teachers Union (SADTU), the largest of the teacher unions, and a Combined Trade Union grouping of smaller Autonomous Teacher Unions generally referred to as the CTU-ATU. Non-statutory bodies include school governing body organizations such as the Federation of Governing Bodies of South African Schools (FEDSAS) and the Governing Body Foundation (GBF), as well as non-governmental organizations and civil movements such as Equal Education. In addition to the above, each of these elements/agents/actors which constitute the system, have to perform their own specific function within legislative, regulatory and policy frameworks which also connects them to the system.

These legislative, regulatory and policy frameworks thus also constitute different elements of the system. Although each of these elements/agents/actors have their own specific function and purpose within the education system, requiring different skills and competencies, they are interconnected and are all obliged to work towards the achievement of a common goal and hence form a complex system.

Complexity theory

Complexity theory is becoming more prominent in educational research (Cohen, Manion & Morrison, 2011, p. 28). The origin of complexity theory can be traced to the fields of chemistry, physics, biology (Mason, 2008a, p. 36), archaeology, psychology, law and sociology (Haggis, 2008, p. 165). Complexity theory also shares the focus that chaos theory places on, as articulated by Mason (2008a, p. 36), "the sensitivity of phenomena to initial conditions that may result in unexpected and apparent random subsequent properties and behaviors". As in the case of chaos theory, complexity theory is concerned with "wholes, with larger systems or environments and the relationships among their constituent elements or agents, as opposed to the often reductionist concerns of mainstream science with the essence of the 'ultimate particle'" (Mason, 2008b, p. 5). As stated by Larsen-Freeman and Cameron (2008, p. 201), "complexity theory works at the system level, and explanation is in terms of the system's behavior, not at the level of individual agents or elements". According to Walby (2003, p. 1) complexity theory not only "offers a new set of conceptual tools to help explain the diversity and changes in contemporary modernities undergoing globalization", but it also "offers a new way of thinking about diverse inequalities and social change …".

Complexity theory requires the researcher to investigate a dynamically interacting system of multiple elements or components (actors) from the 'inside', rather than from the 'outside' or the 'view from above' (Haggis, 2008, p. 172). According to Haggis (2008, p. 172), "this conceptualization of the researcher looking as if from 'within' larger dynamic systems of connected factors is quite common in sociological research, but less so in many forms of small-scale educational research". Key aspects of complexity theory are the interaction aspect, the aspect of feedback, the aspect of connectedness, the aspect of emergence (Cohen, Manion & Morrison, 2011, p. 29), the aspect of context (Haggis, 2008, p. 167), the aspect of unpredictability (Haggis, 2008, p. 168) and the non-linear aspect (Cohen, Manion & Morrison, 2011, pp. 28, 30).

The interaction aspect of complexity theory

This interaction aspect of complexity theory can for example be applied where the principle of co-operative government and its influence on the interactions between school governing bodies and especially provincial departments of education are analyzed. Complexity theory concerns itself, as Mason (2008b, p. 6) puts it, "with environments, organizations, or systems that are complex in the sense that very large numbers of constituent elements or agents are connected to and interacting with one another in different ways". Accordingly, Haggis (2008, p. 169) explains that this distinct arrangement of interactions is to a degree created by the interactions of other larger systems, for example systems of governance, culture, language, policy or funding.

In their explanation of this interaction aspect of complexity theory Cohen, Manion and Morrison (2011, p. 28) go a step further:

> *The interaction of individuals feeds into the wider environment, which in turn, influences the individual units of the network; they co-evolve, shaping each other, and co-evolution requires connection, cooperation and competition: competition to force development and cooperation for mutual survival. The behavior of a complex system as a whole, formed from its several elements, is greater than the sum of the parts.*

Haggis (2008, p. 166) conveys this point by explaining that specific forms of rearrangements will occur from time to time if a sufficient number of such interactions happen over a sufficiently long period of time. Therefore, complexity theory suggests that, as expressed by Mason (2008a, p. 38), "it is in the dynamic interactions and adaptive orientation of a system" that new occurrences and behaviors emerge, resulting in the development of new arrangements and old ones being changed. Therefore, complexity theory holds that "the system is characterized by a continual organization and re-organization of and by these constituents" (Mason, 2008a, p. 36). An example of such organization and re-organization of interactions in the South African education system is found in what may be construed by many as an attempt by the government to limit the powers of school governing bodies. The draft Basic Education Laws Amendment Bill (RSA, 2017) seeks to adjust the powers of SGBs with regard to recommending candidates for appointment to management positions in schools in favor of the provincial Head of Department. If passed into law, the relationship and the level of interaction between school governing bodies and the provincial departments of education will change into one where as far as the appointment of staff school management positions are concerned, the role of school governing bodies will change from an active participant in the appointment process, to a recipient at their school of a person decided on by a provincial Head of Department.

The feedback aspect of complexity theory

The notion of feedback is a key element of complexity theory in that feedback must occur between the interacting components of the system (Cohen, Manion & Morrison, 2011, p. 29). In this relationship between the interacting components which are interacting dynamically at local level (Haggis, 2008, p. 166), interactions are non-linear (Cohen, Manion & Morrison, 2011, p. 29; Haggis, 2008, p. 166) and

there is a "multiplicity of simultaneously interacting variables" (Cohen, Manion & Morrison, 2011, p. 28) with complex feedback loops being enmeshed which "continually adjust and modify both the 'parts' of the system, and the system itself". Haggis (2008, p. 166) explains further:

> *As the system is open, the interactions can also affect the boundaries of the system itself, and indeed have effects beyond it. Moreover, because the interactions are always local, such effects are distributed, rather than emanating from any central cause.*

The feedback may be either negative or positive. Cohen, Manion and Morrison (2011, p. 29) explain that negative feedback is regulatory, whereas positive feedback brings increasing returns, uses information to change, grow and develop and "it amplifies small changes". This feedback aspect of complexity theory is found in the Constitutional Court judgment in the ruling of the combined cases *Head of Department, Department of Education, Free State Province v Welkom High School and others and Head of Department, Department of Education, Free State Province vs Harmony High School and others.* In these cases, the Court held that, as a matter of legality, supervisory authority must be exercised lawfully in accordance with the Schools Act (RSA, 1996a) concluding that, because the Head of Department had purported to override school policies without following the relevant procedures set out in the Schools Act (RSA, 1996a), he acted unlawfully. However, it was acknowledged that the pregnancy policies of the two schools at face-value infringed upon the constitutional rights of pregnant learners, including the right to human dignity, to freedom from unfair discrimination and to receive a basic education. The two schools were ordered to review the policies in the light of the requirements of the Constitution (RSA, 1996c), the Schools Act (RSA, 1996a), and the considerations set out in the judgment. The schools were further ordered to meaningfully engage with the Head of Department in the process of reviewing their policies, according to the principles of cooperative governance enshrined in the Schools Act (RSA, 1996a). An approach which places the learners' best interests as the starting point must contextualize disputes within the parties' duties to engage and cooperate.

The connectedness aspect of complexity theory

A key feature of complexity theory is connectedness. Connectedness exists everywhere (Cohen, Manion & Morrison, 2011, p. 29). The interactions between the components in the system are not only multiple, but they are "multiply connected" (Haggis, 2008, p. 167). As explained by Haggis (2008, p. 167), it is the diverse range of the interactions through time that generates effects because, in this situation, causality cannot be relegated to a single or a limited number of factors.

Haggis (2008, p. 167) explains further:

> *... because of this connected, multi-factor causality, elements that are isolated and conceptually 'removed' from the system of connected interactions, in effect cease to have meaning in terms of understanding that system (though they might have meaning in relation to other such isolated elements abstracted from other systems). The system itself has to be studied, and studied in terms of its interactions (rather than defining 'key elements' in relation to smaller units within the system and comparing these to elements from other systems). However, studying systemic*

> *interactions involves understanding that some of the interactions pertaining to the system being investigated are at the same time also interactions of other, larger/different systems which the system that is the focus of attention is embedded in and connected to.*

This connectedness aspect of complexity theory suggests that phenomena must be looked at holistically (Manion & Morrison, 2011, pp. 29-30). According to Manion and Morrison (2011, pp. 9-30), complexity theory suggests that educational research should move away from, for example, individuals, institutions, communities and systems so that the unit of analysis becomes a web or ecosystem. This is because individuals, families, students, classes, schools, communities and societies exist in symbiosis.

This connectedness aspect of complexity theory featured prominently when examining the possibilities for distributed leadership in South African policy documents (Du Plessis & Heystek, 2020). Public school principals not only have to frame their interactions with the provincial departments of education and their school governing bodies through their connectedness to the accountability framework in which they must operate, but also, through their connectedness with the provincial Head of Department, district offices, their management team, parents, the community and the specific context of their school. This connectedness influences their leadership and management interactions.

The emergence aspect of complexity theory

One of the most important features of complexity theory is that it provides insight through the notion of emergence (Cohen, Manion & Morrison, 2011, p. 29; Haggis, 2008, p. 168; Mason, 2008a, p. 37). This notion of emergence is closely associated with the notion of self-organization (Cohen, Manion & Morrison, 2011, p. 29). As Mason (2008a, p. 37) suggests: "The dynamics of complex systems are inherently dynamic and transformational". According to Mason (2008a, p. 37), the notion of emergence implies that, "given a sufficient degree of complexity in a particular environment, new (and to some extent unexpected) properties and behavior emerge in that environment". Therefore, as stated by Cohen, Manion and Morrison (2011, p. 29), "systems possess the ability for self-organization, which is not according to a prior grand design … self-organization emerges, it is internally generated …". This means, according to Mason (2008a, p. 37) that "the whole becomes, in a very real sense, more than the sum of its parts". This is because the surfacing or manifestation of new characteristics and behaviors are not limited and thus cannot be predicted. At the center of this process is the creativity and knowledgeability of actors. This results in the establishment of new social systems "within and through the self-conscious, creative activities of human actors" (Fuchs, 2003, p. 147). Fuchs (2003, p. 147) explains that in this context the term self-organization refers to "the role of the self-conscious, creative, reflective and knowledgeable human beings in the reproduction of social systems" (Fuchs, 2003, p. 147).

This notion of emergence manifests itself in the draft Basic Education Laws Amendment Bill (RSA, 2017). Through such amendments to legislation, the South African education system is constantly evolving. This dynamic character of the system adds to the complexity of the system.

The context aspect of complexity theory

The context aspect of complexity theory is particularly relevant to the South-African education system with its multiple sub-contexts and features strongly throughout the study. Complexity theory recognizes the relationship of a system with its external environment and the influence this environment may have on the system. In other words, complexity theory not only concerns itself with the multiple relationships within itself, but also recognizes the multiple relationships that exist with the external environment. Complexity theory posits that, as the (open) system evolves through time, "it is in 'constant interaction' with environmental factors, i.e. forces that exist beyond its boundaries" (Haggis, 2008, p. 167).

This distinction between a system and its environment in combination with the, with conceptualizing of systems being "self-organizing and self-reproducing, provides the basis of a new way of thinking about systems" (Walby, 2003, p. 7). By making contextual factors parameters or dimensions of the system, the connectedness of the system to context is exposed (Larsen-Freeman & Cameron, 2008, p. 204).

The non-linear aspect of complexity theory

Complexity theory argues for multiple causality and multi-directional causes and effects, as opposed to methodologies based on linear views of causality (Cohen, Manion & Morrison, 2011, p. 30). As explained by Cohen, Manion and Morrison (2011, p. 30), this is because "organisms (however defined: individuals, groups, communities) are networked and relate at a host of different levels and in a range of different ways".

Conclusion

In education systems there is inter-connectedness with multiple sub-systems which interact with each other. In turn, this implies that a relationship exists between the different elements or agents which constitute the system (Mason, 2008a, p. 37) and through this relationship they influence one another and their wider environment (Cohen, Manion & Morrison, 2011, p. 28). This underscores the dynamic nature of an education system. Because an education system is constituted by multiple inter-related elements or sub-systems, each having a unique but related purpose, complexity theory permits researchers to view education reform, not in a reductionist or narrow manner but rather in a broader and holistic way. Such holistic way allows for recognizing the influence(s) different elements or sub-systems within an education system may have on each other and the system as a whole. Complexity theory therefore not only recognizes the different relations that exist within a system, but also the relationships that exist with the external environment.

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Examining the Differences in Student Self-Assessment of Their Skills in English as a Foreign Language: A Pilot Study Comparing Male and Female Lower Secondary Students

Abstract

Developing English language proficiency is of utmost importance for education systems across Europe. Self-assessment of one's English as a foreign language (EFL) skills is a widely used source of information concerning learners' level of language proficiency. Thus, an investigation of the way different groups of learners assess their language skills is warranted. In this pilot study, we examine the self-assessment of both general and specific (reading, writing, listening, speaking) EFL skills from a sample of Czech lower secondary students and compare these self-assessments across genders. We also analyze the relationship of the self-assessment of specific EFL skills with the self-assessment of general EFL skills for male and female students. Our results show that Czech students are more confident in their receptive skills, while the productive skills are more closely related to their overall language self-assessment. Further research should take into consideration the differences in scale usage between different groups of students, possibly utilizing methodological approaches such as the anchoring vignette method.

Keywords: English as a foreign language, language skills, self-assessment, differences in scale usage

Introduction

The English language is spoken by more than a billion people as their first or second language (Education First, 2020). From the perspective of an individual, learning languages can create new personal and professional opportunities (Baïdak, Balcon & Motiejunaite, 2017). As for companies, workers with language competences are an important resource for their success in global markets (Baïdak, Balcon & Motiejunaite, 2017). The incentives to learn English, thus, have never been greater – yet the demand for English proficiency still outpaces supply (Education First, 2020).

The demand for the improvement of foreign language skills is apparent in education systems across Europe. In most European countries, the age when students start learning a compulsory foreign language has decreased, and in many countries, learning English is obligatory for all students during their compulsory education (Baïdak, Balcon & Motiejunaite, 2017).

Despite the overall improvement of English proficiency levels in Europe, there are still notable differences between speakers from different countries (Education First, 2020).

Self-assessment of language skills

Self-assessment of one's English as a foreign language (EFL) skills is a valuable, widely used source of information concerning learners' level of language proficiency. It is commonly used by researchers (e.g., Dueñas, Plo & Hornero, 2013; Jensen et al., 2011) but also in real-life situations such as job market applications. For example, an online CV creator *Europass* (European Union, n.d.) uses self-assessment of foreign language proficiency A1 to C2 levels, structured according to the *Common European Framework of Reference for Languages*.

The way people self-assess their language skills might thus have many consequences in terms of the accuracy of the information about the level of language proficiency of different (groups of) respondents reported by researchers. It might also impact the position of applicants in a labor market. In terms of one's learning efforts, self-assessment of knowledge and skills is an important factor in further educational decision-making and becoming an autonomous agent in one's own education (Dunning, Heath & Suls, 2004).

Previous research on language skills self-assessment has found robust associations between language learners' self-assessment and objective indicators of language proficiency. A meta-analysis conducted by Ross (1998) showed that the average correlations between learner self-assessment and objective indicators of language performance range between $r = .52$ and $r = .65$ for the four language skills (reading, writing, listening, and speaking). However, numerous factors have been suggested to be related to the accuracy of learner self-assessment, e.g., the type of self-assessment items used, self-assessment training and experience, and the foreign language proficiency level (Liu & Brantmeier, 2019).

It has also been suggested that the accuracy of language skills self-assessment might differ by learner characteristics such as gender (Tamjid, 2008). The male hubris/female humility phenomenon (i.e., the tendency of men to overestimate and women to underestimate their abilities) has been examined in the area of self-claimed vocabulary knowledge, however, corroboration of this phenomenon has not been found (Ackerman & Ellingsen, 2014). Thus, an investigation of the way different groups of learners (based on gender but also other characteristics) assess their language skills is warranted.

Research questions

In this study, we examine the self-assessment of EFL skills and compare self-assessments between male and female students. The comparison is made for both the general EFL skills and specific EFL skills (reading, writing, listening, and speaking) separately. We also analyze the relationship of the self-assessment of specific EFL skills with the self-assessment of general EFL skills for male and female students.

Our main research questions are as follows:

(1) What are the differences in the self-assessment of general and specific EFL skills between male and female lower secondary students?
(2) What is the relationship between self-assessment of specific EFL skills and general EFL skills self-assessment for male and female lower secondary students?

Methodology

EFL skills self-assessment questions

In our study, we let the respondents assess their general EFL skills (1 question) and specific EFL skills – reading, writing, listening, and speaking (4 questions). The general self-assessment question and an example self-assessment question for reading are:

How would you assess your level of English in general?

How do you assess your level of the following specific skills in English?

- Reading texts in English

The students were asked to assess themselves on the following seven-point scale: *0 No skill at all*, *1 Beginner*, *2 Elementary*, *3 Intermediate*, *4 Upper intermediate*, *5 Advanced*, *6 Expert*. In the analysis, the students' responses were coded as ranging from 1 (corresponding to no skill at all) to 7 (corresponding to expert).

Sample

Our pilot study was conducted at four Czech lower secondary schools (ISCED 2) of different types. Two schools were regular, state-governed, nonselective schools providing general education to a wide population of students. The other two schools were elite, private, selective grammar schools providing general education to academically oriented students. Students in the last year of their compulsory education (generally 14 to 16 years old) were selected for the study. In this paper, we analyze the data from 150 students (91 girls, 59 boys) for whom we had a complete data set in terms of their EFL skills self-assessment and gender.

Results and discussion

For each student, we calculated a mean self-assessment on the seven-point scale for each of the five self-assessment questions (one general self-assessment question and four language skill-specific questions). In general, boys assessed their skills as higher across all five self-assessment questions than girls, the difference being the highest in the general self-assessment question and the smallest in the domain of speaking. None of the differences, however, reached statistical significance. If we rank the mean responses to the four language skill-specific self-assessment questions, both boys and girls assessed their reading skills as the highest, followed by listening, writing, and speaking skills. Thus, in general, both boys and girls reported higher proficiency in receptive skills than productive skills.

This finding is interesting as it suggests that Czech language learners are more confident in their receptive skills in comparison to the production of language. This might be partly attributed to the emphasis placed on the particular skills during the EFL classes at school. Video studies conducted on a sample of Czech lower secondary level EFL teachers indeed showed that reading and listening, receptive language skills, are more prominent during language classes than productive skills (Šebestová, Najvar & Janík, 2011).

Furthermore, we conducted a correlational analysis, examining the strength of the relationships of the four language skill-specific self-assessment questions with

the general EFL self-assessment. For the whole sample, the strongest association was found between general EFL self-assessment and writing, followed by speaking, reading, and listening. The same pattern was observed when analyzing the data for girls separately. In the case of boys, the strongest association was found between general self-assessment and speaking, followed by writing, reading, and listening. Thus, for both boys and girls, productive language skills self-assessments correspond more closely to the general EFL self-assessment than those for receptive skills.

An intriguing phenomenon occurs when productive skills, which the students are less confident in, seem to correspond more closely to their general language self-assessment. It is possible that when evaluating their global language proficiency, students take the specific language skills into account to a different degree. In the case of our sample, it would appear that both boys and girls rely, when making global self-assessment, more on their "weaker" skills. This might indicate that learners might generally focus more on their weak spots in language proficiency when making the assessment. Alternatively, it might also be the case that language production is simply more important to learners when making a global judgment of their abilities, irrespective of whether they see themselves more proficient or less proficient in productive skills than the receptive ones. Further research inquiry should focus on this matter in more detail.

Also, there are some methodological considerations that need to be further examined. Previous research using student self-assessment in different areas has suggested that groups of respondents might differ in the way they use scales when responding to self-assessment questionnaire items (e.g., Kyllonen & Bertling, 2013). For example, two students with the identical objective level of a certain skill (e.g., English as a foreign language proficiency) might assess themselves in response to self-assessment questionnaire items differently – one as advanced, while the other only as intermediate (Vonkova & Hrabak, 2015). These differences might bias the self-assessment data, hindering the accurate comparison of different groups of students. Previous research has shown that there are differences in scale usage between boys and girls, for example, in the domains of student dishonest behavior (Vonkova, Bendl & Papajoanu, 2017) and life satisfaction (Vonkova, 2019). It is possible that such differences might also exist in the domain of EFL skills, potentially biasing the results of research in this area.

Further research should take the differences in scale usage in the domain of EFL skills into consideration. Methodological approaches have been suggested in research to (a) identify and (b) adjust for these differences to improve the comparability of self-assessment data (e.g., Kyllonen & Bertling, 2013; Vonkova, Bendl & Papajoanu, 2017). Some of the promising approaches that might be well suited for application in the EFL domain are the anchoring vignette method and the overclaiming technique. We strongly recommend that researchers utilize some of these approaches in further research to examine the way learners assess their language skills in more detail.

Conclusion

Our results have shown that, on average, boys assessed their language skills (both general EFL skills and reading, writing, listening, and speaking skills

separately) higher than girls, although the differences were not statistically significant. In general, both boys and girls reported higher language proficiency in receptive skills (reading, listening) than productive skills (writing, speaking). As for the relationships between the four language skills self-assessment and the general EFL skills self-assessment, the productive skills self-assessments correspond more closely to the general self-assessment than the receptive skills self-assessments for both boys and girls.

Overall, it seems that Czech learners are more confident in their receptive skills, while productive skills are more closely related to their overall language self-assessment. However, a potential limitation of our study is that we used only a correlational analysis. Also, we conducted our study on a rather small sample of students. Future analysis using data from more respondents might provide deeper insight into the way different groups of students assess their EFL skills. Future research should also take into consideration the differences in scale usage between different groups of students, possibly utilizing methodological approaches such as the anchoring vignette method.

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