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# Keynote address:
## Comparatively speaking: Notes on decolonizing research

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***Il ne s'agit plus de connaître le monde, mais de le transformer***
(What matters is not to know the world but to change it)

These words first appeared in a doctoral dissertation written by a medical student in the mid-twentieth century. The thesis was failed when it went to examination and, understandably, the young man was unhappy with this result, but he decided to go ahead anyway and publish his ideas in a book. It came out in 1952 under the title, *Peau Noir, Masques Blanc* (*Black Skin, White Masks*). The author was Frantz Fanon, a descendant of slaves who was born in the French colony of Martinique in the shadow of a brutal colonization and he was later to become a key figure in modern decolonization studies. Fanon died at the age of 36, less than ten years after the publication of this book, but he left a considerable legacy. The aspect of his work that I will address here relates to decolonial transformation and change (Fanon, 1952); and, what I particularly want to ask, in the context of comparative and international education, is how might we understand decolonial thinking today?

This question is important not least because a number of comparative education scholars have been doing some deep soul-searching lately. Earlier this year, for example, comparative education scholar, Maria Manzon (2018), turned the spotlight on academic complicity. She was especially interested in academic collusion with the doctrine of fascism in the field of comparative education during the 1930s. Erwin Epstein (2018) calls this "the darker side of comparative education" (p. 50). The story they each tell about the history of comparative and international education is troubling.

From their respective papers, we learn that the first internationally recognized journal in the field, *The International Education Review,* was founded in Germany in 1930 during the rise of Hitler where it was co-opted as a vehicle for fascist educational thinking. Between 1931 and 1938, Paul Monroe, from New York's Columbia University, acted as the American co-editor. Monroe was a well-respected scholar and he was not a regime sympathizer but his professional relationship with the journal gave it a degree of apparent credibility. Comparative education was not by any means the only field where academics engaged with the German professoriate of that era, but it is my focus here. I will also suggest that it is at times like this that the choices we make as comparative and international education scholars come to matter in important ways.

After the War, the comparative education community acted quickly to refashion the journal. It was renamed *International Review of Education,* an international editorial

advisory board was appointed, and the Nazi "interlude" was forgotten. So, why should we remember this "episode"? Why rake it all up now it is over and done with?

Part of the answer comes from Erwin Epstein (2018) who wrote about this history. He notes that "[j]ust as a house cannot stand without a foundation, so an academic field cannot rightfully contemplate the future without grasping the fullness of its past" (p. 58). This material is only coming to light now, so these discussions are timely. We *do* need to be thinking about how our field of research operates. We need to be asking who the key players are; and, we need to consider which voices aren't being heard. In order to fathom these matters, we need to understand how our fields of inquiry have been shaped over time.

In other recent research, we also discover that most of the papers published in comparative and international education journals are written by academics in the global North (Batra, 2018). This confirms what many of us already know, or have long suspected, and it is a matter for concern. As indigenous people of Oceania, our schools and our communities are more often the focus of comparative studies. As such, we are more often "the studied"; those unnamed, barely visible participants who appear fleetingly in research papers rather than the principal investigators. Perspectives from the global South are often fairly silent in these publications and indigenous voices or Pacific voices are rarely heard.

These are the largely hidden transcripts of comparative education. It is a field that relies heavily on accounts of Oceanic lives and classrooms written by scholars who are not always, themselves, rooted in or accountable to the communities that they study. All too often, comparative education researchers are travellers in those worlds and, in some cases, they are simply passing through on their way to their next study or research grant. I have no doubt that most of these scholar-travellers care a great deal about the schools and the classrooms and the people they meet along the way. But the problem is that the benefits of those encounters that take place in indigenous or Pacific or marginalized educational space tend to flow more directly towards them in terms of promotions, professional recognition and academia's other "glittering prizes". The benefits are frequently much less evident for the people living in those communities. So, if we are committed to transformation and to decolonizing the field of inquiry then these are the questions that we need to ask. And, in the end, this is also the kind of soul-searching that we all need to do from time to time. This kind of reflection offers us a range of choices in comparative and international education.

So, what are those choices?

Obviously, one of them is that we can elect not to acknowledge the awkward silences and difficult histories in the field of education studies. We can choose not to recognize the anglocentric nature of its scholarly practices. Or, in other words, we can keep on doing what others are already doing. We can take the view that there is nothing to see here, folks. Everything is just—peachy.

Although, if I may say, there are obvious risks involved with willfully researching while blindfolded. It is not always the best thing to do.

Fortunately, we have other choices. For example, in response to hearing about the "darker side of comparative education" (Epstein, 2018) we can say, quite firmly: "All that's in

the past. It's over now. All those Nazis are dead. Let's just move on" (p. 50). And that is certainly another possibility. We can look forward and set the past aside. To an extent, of course, this is precisely what has happened in comparative and international education over the years. But the problem is that when something enters the DNA of a disciplinary field; when there have been intellectual transgressions and a history of silence and denial that surrounds those transgressions, then traces of the past invariably linger in the present and that can trip us up. It can also cast a halo around an intellectual domain that is not necessarily well-deserved.

Another choice, then, is to own the difficult past and acknowledge the history of our scholarly fields. As uncomfortable and awkward as that might make us feel and as flawed as those scholarly practices are that silence or exclude indigenous voices, we can choose to recognize this. We can refuse to condone what has happened in comparative and international education and what is happening still in terms of who has power in these fields, and who does not. In other words, we can choose to be vigilant. In that scenario, we can make it our business to educate ourselves about past transgressions in the scholarly domain and understand how they linger in the present often in very subtle ways. That is certainly an option too and it is one that I choose myself from time to time.

But, in the end, just simply knowing that something is happening is not the same as working towards changing it. So, it is not wildly helpful if nothing very much is different as a result of our knowing. All that happens is that we have a better understanding of the status quo but essentially it is left it to others to begin the process of decolonization.

So, I think that there are other choices that we can make as scholars and one of them is to act in ways that actually change the field. Or, to paraphrase Fanon (1952, p. 33): What matters is not merely to know the world *as scholars*, but as scholars to change it.

I think we need to change the field of comparative and international education. It's time.

But how do we do that? How do we usher in this brave new scholarship?

My answer is that I simply don't know.

I don't think there is a one size fits all programme for revolutionary scholarship or scholar activism. And, I don't think that when the revolution comes, we'll all be at the same barricades together. But I do think that this change will happen because it has already started. The old paradigms that have served this field for a very long time are crumbling. Many comparative and international education scholars are asking difficult questions about who is doing the speaking and who is not being heard.

So, perhaps it won't be televised but the uprising *has* begun.

There is a rustling and a murmuring in the dry bones of the academy and a whispering of new voices in its still, quiet places.

So, listen carefully. Listen, and you will hear it.

It is the sound of indigenous scholars and scholars of colour.

It is the sound of Oceania.

It is the sound of the global South clearing its throat—and standing up.

It is the sound of those scholars who live in the marginalized spaces of the institution—saying "no"—and breaking the silence.

It is the sound of smashing plates and broken crockery.

I do not know the answer to how we transform this field but in the end, it doesn't really matter because it's already coming our way. Your choice now is to decide where you stand and what you do next.

I want to speak directly to the indigenous people of Oceania and to scholars of colour who are here today. Later on, I will speak to or Pākehā (settler heritage) allies in the field. But first, I will speak to Oceania.

Friends, one of the things that I want to say is that as indigenous scholars we need to be mindful of the environments that we are working in. In 25 years as an academic working in the field of education and comparative higher education, I have learnt that academic disciplines are riven with power relations.

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There are those who accumulate power within the fields of scholarship and good on them, but it is not, and it has never been, an equal playing field for us. Not ever. And that is the pathological dysfunction of academic life in the neoliberal university for indigenous scholars of Oceania.

The first thing is we learn in our early years in academia is that there are very few of us. Really? You might ask, how few?

Let's do the maths.

Currently in New Zealand's eight universities there are 10,360 full-time academics employed.

10,360 (Ministry of Education, 2018). Remember that number.

Of those 10,360 academics, 495 are Māori, or around 4.8% of the total academic workforce in New Zealand.

How does that look for Pacific scholars in New Zealand?

Of those 10,360 academics, 155 are Pacific scholars, or 1.5% of the total academic workforce in Aotearoa; 1.5% in the land of the long white cloud.

Let's drill down a little further. Let's ask about professors in New Zealand. Who are the senior scholars who shape and mould their disciplines in Aotearoa?

In 2017, there were 1,060 full professors in New Zealand universities of whom 35 were Māori– less than 4% of the New Zealand professoriate.[1]

What about professors who are Pacific people? What of them?

[1] These numbers, drawn from Ministry of Education records, were provided by Dr Tara McAllister, Te Pūnaha Matatini, University of Auckland, New Zealand.

Currently, there are five in New Zealand.

Yes, you did hear me right.

Five Pacific professors out of 1,060 professors in New Zealand universities; or less than half a percent of the academic workforce in this nation in the Oceania region.[2] The Ministry of Education rounds numbers up to five, so there may be even fewer Pacific professors.

So, let me repeat what I said earlier: Academic disciplines are riven with power relations.

I want to ask about the hidden emotional labour buried in those figures.

What is the hidden emotional work that the indigenous scholars of Oceania have to do everyday when we are at work in our disciplines?

And, what are the hidden costs when there are so few of us and when there is so much we have to say?

Inside the universities of Oceania, institutional racism shapes how we build academic careers as indigenous people of this region. These are difficult matters to discuss but I think we do need to talk about them. In a recent comparative study with my colleague, Dr. Cherie Chu, we spoke to Māori and Pacific senior academics about their experiences in New Zealand universities. One senior scholar told us this:

> [I]f you are Pākehā and you do research on Māori—you get a promotion. If you are Māori and you do research on Māori—you get ignored or it's seen as being very threatening. If you are Pākehā and you speak in support of Māori, you are seen as a good person. But if you're Māori and you speak in support of Māori, you get accused of cronyism. The "R" word; "Racism," seems to have a kind of magic power over Pākehā. When the word is used, it's like the flick of a switch and the defences go up. I used to use the word to give what was happening a name... but I've stopped doing that because all it does is make white people go deaf. They literally cannot hear anything that is said after the word "racism" is used in a sentence. (Kidman & Chu, 2015, p. 67).

And there's the rub. Because for many of us working in comparative and international education, "racism" is the word that dare not speak its name. Not even in those public universities where academic freedom and freedom of speech is treasured—where acting as critic and conscience of society is protected under the *New Zealand Education Act*.

The reality for many indigenous scholars of Oceania is that unmasking racism in academia or in our academic disciplines is often a decisively career-limiting or, indeed, a career-ending option. For myself, I'm not immune to this but I'm fortunate because I am part of a generation of indigenous women who had some very good mentors. There were Māori women in the academy who came before us who acted as our guides and protectors. We had Professor Ngahuia Te Awekotuku, Professor Linda Tuhiwai Smith, Associate Professor Leonie Pihama, Dr Ngapare Hopa, Dr Kathie Irwin, and others. There weren't very many of them and they were always overworked but they encouraged us always to

[2] These numbers were also provided by Dr Tara McAllister, University of Auckland, drawn from Ministry of Education records.

speak back to power. Many of these women work in the field of education so it is important to speak their names here.

It is important to speak their names.

These women often put themselves between university managers and some of their more outspoken and more junior Māori colleagues. Sometimes they took the institutional "hits" for us and I am eternally grateful to them and I'm mindful of something that the Black activist scholar, Audre Lorde (2017), once wrote: "When we speak we are afraid our words will not be heard or welcomed. But when we are silent, we are still afraid. So it is better to speak" (p. 201).

I believe, in the end, that it is better to speak.

If we are committed to decolonizing the fields of comparative and international education then there are many places where we can begin, but speaking up, I think, is one of those starting points. Importantly, what I also learnt from my mentors—those Māori women who came before me in the academy—is this: One of the greatest acts of resistance in the neoliberal settler-colonial university happens when indigenous scholars act decisively to care for each other, as scholars.

I am not talking here about some kind of cheesy, schmaltzy greeting card kind of call to "lurve" one another because maybe it is an agreeable and companionable thing to do. Because the thing is—we do not necessarily love each other; and, sometimes, the truth is that we do not always necessarily even like each other that much. And that's okay, because we don't live in Disneyland. We don't have to tie our anger up in a pretty pink bow. But to rise above the differences between us that are real, and which *do* matter, is to fight back. It is a powerful way of reclaiming our dignity in the neoliberal university. To use our anger to heal ourselves and the wounds that we inflict on each other after generations of living in white colonial space—this is an expression of hope—and hope is important.

But let me be clear; I'm really not "doing Disney" here because, as we know, hope has many faces and not all of them are good ones. Hope can be naïve. Paulo Freire (1992) tells us that it can keep people locked inside an oppressive situation, longing for our situation to improve. In the neoliberal academy, naïve hope can be a kind of "cruel optimism" (Berlant, 2011). Cruel optimism is the belief that if we keep cooperating with neoliberal university administrations; that if we keep on being nice to them; if we keep on doing what they ask; work those 15 hour days; turn up to every pōwhiri (Māori welcoming ceremony); smile at them and give them compliments, sooner or later surely they'll give us a promotion or they'll employ more of Māori or Pacific academics or people of colour, surely? Or, they'll cite us more often. Or they'll listen to our concerns and act on them. Or, they'll behave like active Treaty[3] partners. *Surely!*

[3] "Treaty" refers to the *Treaty of Waitangi*, signed in 1840. This pact between Māori people and the Crown which promised an equitable, honorable and fair relationship. Since its inception, the *Treaty* has been largely dishonoured by the Crown.

Cruel optimism is the kind of hope that leads us nowhere and which chains us to the status quo. Cruel optimism ties us irrevocably to life as it already is under settler-colonialism—and that is not the kind of hope that I mean.

Because some kinds of hope can be powerful.

Let me call on the work of the Marxist philosopher, Ernst Bloch, the Jewish political scholar who fled the Nazi regime during the rise of Hitler. For a while, he lived in New Hampshire in the United States and during his time there, Bloch wrote his treatise, *The Principle of Hope* (1995).

And in the *Principle of Hope*, this man who fled the horrors of his native land and who lived at a time when his people were being vilified and slaughtered by the massive military machinery of fascism, wrote of a powerful form of hope—a life-giving hope—which he called the *docta spes*.

*Docta spes* is a form of educated hope, or informed hope. It understands the horror of hatred. It knows, intimately, that not all endings are happy ones, but it educates itself about change. *Docta spes* is the informed and educated hope that the world can be transformed.

So, in the end, the *docta spes* provides us with a concrete "methodology" for people to act collectively in the interests of their own becoming (Kidman, Ormond, & MacDonald, 2018). And that is all I am saying here.

A transgressive *docta spes* for those of us working in comparative and international education gives us all, including our Pākehā colleagues, informed responses to the imperial legacy of the university which has divided us. It gives us informed responses to the colonial basis of fields of inquiry, like comparative and international education, and opens up ethical possibilities for a kind of indigenous everyday hope. It can also provide us with counter-responses to settler-colonial educational aims that constrain us, silence us and exclude us. Everyday hope is not a grand or sweeping gesture. It is quieter and much more mundane. It speaks to the small, quotidian moments that happen in the passage of a day or a month or a year and which are the building blocks of our daily lives. That is often where real change begins. It can happen while we're doing the ironing.

As well, an informed and educated everyday hope for indigenous people can potentially open up a strategic framework where we can mobilise indigenous ways of knowing and being in academia and in our fields of research. If we are committed to transformation, this is also one of the places where we might usefully begin because, at its heart, informed everyday hope can give us an ethic of care in our dealings with each other. As indigenous scholars, when we care for ourselves and when we care for each other—even when we are in the grip of terrible anger—that is an act of resistance.

It is an act of defiance.

It is an act of refusal.

It is an act of solidarity.

It allows us to deny the power of the colonizer—that relentless, hectoring voice—passed on through settler-colonial generation after generation.

It allows us to switch off that colonizing script that insistently whispers to us to silence or suppress, or even, injure the Native Other—the indigenous Other—as well as our own indigenous selves. We can use this kind of hope to fight that voice—to banish it, and to heal.

So, in closing, let me turn my attention to my Pākehā colleagues because I know that many of you have spent time—and, in some cases, you've spent many years of your time––figuring out how to be good Treaty partners and how to be effective white allies in the academy.

I know that this is sometimes very painful work. It takes courage.

I applaud you for having that courage.

There are times, when acting in our defence, you have put your own careers and interests on the line. We know this and we do not forget those who have spoken out. Pākehā allies, the *docta spes* is yours as well.

But all fields need new members and I've been delighted to see so many younger Pākehā scholars coming into the field in recent years. I hope that you'll find a home here. The only advice that I have for you as you're starting out is this: As Pākehā scholars, good intentions matter. And, I know there are good intentions.

But understand this, as well: Good intentions can be weaponized in the neoliberal academy.

In a market-driven, highly competitive, deeply and psychotically individualistic settler institution, good intentions can be turned against the very people you might most want to work alongside: the indigenous peoples of Oceania.

In the neoliberal academy, understand that good intentions can turn sour.

Recognize that when you come into our communities and our classrooms and our university offices with good intentions and eager smiles, you're almost certainly the latest in a long line of people who have come before you with the aim of helping us, or saving us, or changing us, in one way or another. We've met you before in the guise of those other scholars, those travellers who preceded you—bristling with good will.

So, understand this: Decolonization won't come for us from the academic promotions and professional recognition that you will get as a result of speaking to our communities and our people.

Decolonization won't come for us from the knowledge that you will take from your conversations and interviews with us and which you will publish in academic journals.

Decolonization won't happen for us when you are speaking about us but not with us.

Decolonization won't happen for us when you try to save us because when you try to save us it means you haven't heard our solutions or recognized that we need to find our own answers first.

But I have hope. So, to our white allies who are here today, in closing, I want to read you a love poem. It was written in 1899 by the Irish poet, William Butler Yeats, in the last year of the Nineteenth Century, which some historians have called "Britain's Imperial

Century". It was a time when the industrial revolution was at its height and the English countryside was disappearing under hundreds of miles of newly built railway tracks; and, when the growth of new cities with their smoke-filled factories, were belching poisonous fumes into the air.

It was a time when the British Empire was reaching its zenith; a time of huge political expansion and a time of encounters with new peoples in distant lands. It was a time when all the old rules were being overturned. And, it was in that time of change, that William Yeats wrote a poem about love.

And so, Pākehā allies, this one is for you. It's called *He Wishes for the Cloths of Heaven*, and this is how it goes.

> Had I the heaven's embroidered cloths,
> Enwrought with golden and silver light,
> The blue and the dim and the dark cloths
> Of night and light and the half-light;
> I would spread the cloths under your feet:
> But I, being poor, have only my dreams;
> I have spread my dreams under your feet;
> Tread softly because you tread on my dreams.
> (Yeats, 1984, p. 171.)

These are the words I want to close with: Tread softly, Pākehā allies and comrades.

To those of you who are just getting started in this field; understand that we are not a white man's burden. We are not a white woman's burden. We are not a white scholar's burden. But sometimes you are ours.

So, tread softly because there are only so many love songs that we can sing.

Tread softy, Pākehā allies, and decolonize.

Tread softly. Decolonize. And, repeat.

Tread softly. Decolonize. Repeat.

And, remember: *He waka eke noa*. We're all in this together.

*Kia ora.*

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# Melanesian *tok stori* in leadership development: Ontological and relational implications for donor-funded programmes in the Western Pacific

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*Donor-funded programmes in areas such as leadership development take place in every continent. In the Western Pacific, Melanesia has been host to such programmes based on non-Melanesian thought and practice over the years. However, a review of donor-funded leadership programmes in the region reveals a history of concern regarding effectiveness but no significant change in programme orientation. This article provides a counter-story of a donor-funded leadership programme which utilizes a readily available cultural model of thought and practice of Indigenous origin:* tok stori. Tok stori *is a form of discursive group communication which is an everyday occurrence in Melanesia. The experiences of leadership mentors operating in a* tok stori*-centred leadership development programme located in the Solomon Islands provide an opportunity to explore and evaluate what cultural wisdom can contribute as the core of a leadership development programme. The benefits are many: leaders benefit when complex contextual matters can be introduced into leadership development by the openness of* tok stori*; depth of engagement is supported by the development of mentor-leader relationality as an integral part of the* tok stori *process; and mentors gain increased expertise in using a cultural form with which they are already familiar in new pedagogical contexts. Ultimately, this is a story of the value of honouring important aspects of culture for those who inhabit the ontology which gives them significance. Re-negotiating the way the cultures of donors and recipients are regarded by programme developers is an important factor in the centring of Indigenous thinking and practices such as* tok stori *in leadership and other person-centred programmes. The lesson of this article is that there are gains available to all where this occurs.*

*Keywords: tok stori; leadership development; postcolonial theory*

## INTRODUCTION

Donor-funded programmes in areas such as leadership development are no doubt well-meaning. They assume importance when the relationship between the quality of

leadership and outcomes in areas such as education is considered. However, where ideas from one place are used in another, problems can arise (Fernandez, 2016). In inter-cultural contexts such as donor-funded programmes rolled out in Melanesia, issues which have ontological origin can be provoked by relational inequity between programme funders and programme recipients. This article addresses the area of donor-funded leadership development by examining the case of *tok stori*, a Melanesian cultural form used as the basis of a programme of leadership development in the Solomon Islands. A programme which uses Indigenous thought and practice as a navigation bucks the trend in donor-funded practice, giving a window on what is possible when re-thinking occurs. An examination of the effects and effectiveness of *tok stori* in this context provides a counter-story based on Indigenous capital, a kind of community capital (Yosso, 2005) which widens the scope of what could be taken into account when programmes are constructed and evaluated. The story offers an example capable of supporting further developments in donor practice, donor-recipient inter-cultural relations, and in the way Indigenous practices, such as *tok stori*, are understood in non-traditional contexts. For while *tok stori* is most relevant in the Western Pacific, ground-breaking developments in this region offer wisdom to the wider world.

## *Tok stori*

*Tok stori*, a form of discursive group communication, is an everyday occurrence in Melanesia. As a habitual activity, those who practice may not examine its parameters or dwell on its significance. To an observer, however, its significance is indicated by its ubiquity and flexibility; its parameters shift to suit the needs of Melanesian life. To speak of *tok stori* is to invoke a way of negotiating with the social world. In *tok stori*, relationality, information and time come together to form a distinct way of being.

In the literature, some attempt has been made to clarify *tok stori* as a cultural form. *Tok stori* has variously been described as an accepted Melanesian way of sharing what is known (Vella & Maebuta, 2018), an inter-generationally legitimized Melanesian discussion mode (Brigg, Chadwick, Griggers, Murdock, & Vienings, 2015) and a traditional dialogic problem-solving method based on reflective oral activity (Evans, Guy, Honan, Paraide, & Muspratt, 2010). These descriptions are linked by evoking an oral activity focused on purposeful sharing and which has a long heritage. In *tok stori*, storying is something one does together: a story is constructed by speakers and listeners. *Tok stori* takes place when people interchange and exchange, creating a collective experience in which the development of relationships is both an accompaniment to, and a purpose of, storying. Group activity which develops knowledge is the stuff of life in Melanesian societies: this truth is embodied in the everyday nature of *tok stori*.

## *Tok stori, talanoa* and context

Depending on one's perspective, the relationship between *tok stori* from the Western Pacific and *talanoa* from the Eastern Pacific may appear distant or proximal. In some contexts, a clear separation has been made. Halapua, a Tongan, deliberately employed the terms *talanoa* and *tok stori* when working for inter-group reconciliation following armed conflict in Fiji and the Solomon Islands respectively (Halapua, 2000; Spence & Wielders, 2006; Talanoa & Development Project, 2005). A salient aspect in these endeavours was local ownership of process, established by using both a relevant and familiar term, and by framing discursive activity through recognized cultural protocols (Talanoa &

Development Project, 2005). *Talanoa* and *tok stori* may also appear distinctive in traditional contexts. At the village level, what can even be considered *tok stori* demands detailed specific attention (Van Heekeren, 2014). Similarly contextual are the levels of *talanoa* described in Tongan scholarship (Fa'avae, Jones, & Manu'atu, 2016; Vaioleti, 2013). Thus, in some circumstances, *tok stori* and *talanoa* as practiced may seem distantly related. However, if an ontological lens is applied, *tok stori* and *talanoa* may appear close.

An ontological lens applied to *tok stori* and *talanoa* pays attention to understanding the world as dialogic, relational and processual. Ontologically, *tok stori* and *talanoa* may appear overlapping: both are group-based oral negotiations aimed at increased understanding promoted by relational development. This similarity is reflected in the way some writers have used the terms interchangeably (Houma, 2011; Nanau, 2014; Sanga, 2016). A unifying ontological perspective is perhaps most relevant in contexts where connections between people focus on an aspect of non-traditional and/or professional life, such as educational leadership development. Under such circumstances, less prescription or expectation about precise forms of conduct may exist. Instead, what can navigate conduct is the general way one makes sense of the world.

Despite similarities which may sometimes stretch to the point of synonymity, we advocate for *tok stori* as the appropriate name to use for discursive activity in leadership development in Melanesia. A name can affect the relationship which people understand to exist between themselves and a thing or practice. In Melanesia, the term *talanoa* may evoke something which needs to be learned or borrowed. *Tok stori*, however, is known, owned, and can be developed confidently by Melanesians because of their familiarity with it. Thus, in discursive pedagogical leadership development, talking of *tok stori* places power in the hands of Melanesian leaders as experts. This, in turn, can influence the level of pedagogical effectiveness.

Unfortunately, despite its availability, ubiquity and cultural value, *tok stori* as a mode of learning is not always used in educational leadership development in Melanesia. Many branches of leadership development have developed their own conceptual languages, ways of operating and implied, if not conscious, understandings of the world. Instead of *tok stori*, traditions which are more didactic and less deliberately relational are common in the Melanesian region (Sanga, 2009). Examples in educational research include Malasa (2007), who used interviews to study the effectiveness of Solomon Islands school leaders, Akao (2008), who used interviews with Solomon Islands women leaders, and Sisiolo (2010) who used interviews to study school leaders in the Choiseul Province. A common feature of these studies is their deficit-oriented conclusions about Solomon Islands educational leadership. This unquestioned use of non-Melanesian introduced approaches can contribute to a learning environment where the Melanesian mind is a relative stranger and the effectiveness of deliberate leadership development is muted.

## Leadership programmes and Melanesian culture

Leadership initiatives have a long track record in Melanesia. Sanga (2009) reviews two programmes designed to increase leadership capacity among positional leaders in the public service in Solomon Islands. He notes that, although both programmes reflected contemporary environments for reform and dealt with appropriate content and topics, participants, donors and programme deliverers identified issues of effectiveness. He laments a recurrent historical pattern: introduced leadership programmes have frequently

delivered the same skills, knowledge and competences through Western-devised approaches despite negative experiences of post-training implementation. In this situation, Sanga's answer is context: when devising methodologies, pay attention to the Melanesian mind.

Sanga (2009) describes the Melanesian mind in the context of public service as having three *masters*: culture (or *kastom*), church and formalized institutions. Each domain is legitimate, demands allegiance, and competes for loyalty with the others. Programmes which target the second and/or third domain at the expense of the first can result in the misreading of default Melanesian behaviour. Leadership programmes in which linkages and relationships between domains are erased do not well serve the complexities of leaders' lived experiences. To Sanga, "The need is for programme designers to appreciate better, the tensions between understanding of roles, rules and knowledge in [the various] domain[s]" (p. 1). Instead of methodologies which sit well in an alien ontology, collaboration between donors, providers and leaders may offer a pathway to more productive leadership training. A Melanesian mode of collaboration suitable for pedagogic use in the leadership context is *tok stori*.

## RESEARCH: *TOK STORI* IN LEADERSHIP DEVELOPMENT: A SOLOMON ISLAND EXAMPLE

We now turn attention to original data regarding *tok stori* as a pedagogical tool in leadership development in Melanesia. This discussion uses data from a mentorship programme of the Fellowship of Faithful Mentors (FFM) which was aimed at socializing Solomon Islands mentors to support Solomon Islands school leaders in a donor-funded leadership programme which took place in 2017 in the Solomon Islands. The programme had goals for developing leadership capacity in school leaders, generally principals. Commonly, leadership development programmes in Pacific Islands regions use approaches which begin with an assumed needed competence (knowledge, skills). In this Solomon Islands programme, an early programme proposal involved rubrics for semi-structured interviews between leadership mentors and practicing leaders. For instance:

*1. What is your school vision? 2. Do you have structures and routines in place to support your leadership goals? If so what are they—if not why is this difficult?*

These rubrics were designed to scaffold interaction so as to collect data directly relevant to pre-set programme outcomes, such as:

*Teachers and school leaders have knowledge of patterns of teaching and learning practice related to instructional learning for their schools.*

While outcomes of this nature are defensible as part of a school leadership strategy, the proposed modes of data generation (semi-structured interview), and consequent mentoring against pre-developed targets serve to position power overwhelmingly in the hands of programme mentors or deliverers. However, through consultation, the programme details were reviewed and replaced by a person-development strategy centred on *tok stori*.

As a tool to review the programme, Sanga (2017) offered a framework for leadership development in Melanesia. This aligns a specific model of leadership with an understanding of the potential of *tok stori* in leadership development. The leadership

model draws its inspiration from sources such as Sanga and Walker (2005). It involves five key concepts: the leader as a person; leading as an activity; leadership as the alignment of people, resources, context etc. with a vision towards change; a reference point or True North (George, 2007) by which the leader navigates; and leadership development, movement or change. Between these concepts is a sense-making action-oriented holistic space. In this space, productive intersections of people, ideas, actions and vision occur. For instance, the understanding of leadership held by a leader can generate action, framed through their True North and directed at their vision of change (George, 2007; George, Sims, Mclean, & Mayer, 2007).

Sanga (2017) aligns this leadership model with an understanding of *tok stori* as a discursive sharing and investigation of experience, capable of pedagogical or person development. Experientially, leadership is positioned by and between three broad dimensions: the leader; leading or leadership; and the environment. In the Melanesian context, a complex aspect of the environment is inter-domain positionality. This can be appreciated through Houma's (2008) helpful metaphorical '*Iora* framework which imagines education as a journey, and school as a canoe in which seats are delegated by the community to various community members. School leadership is "a form of collaborative leadership where authority is shared amongst a team of leaders who head the family groupings which occupy the seats within [a] canoe" (p. 3). Although everyone in the canoe takes part in the journey and thus has leadership responsibilities, who a leader is and where they are sitting affects their experience of leadership. The seat one occupies in the institutional domain of school may not be the same as that one occupies in other domains. Thus, intersections between the person of the leader, their ideas of leadership and their environment shape lived experience. This complexity becomes open to reflection when it is the matter of *tok stori*.

Where *tok stori* is used for pedagogical purposes, part of the relational dynamic is the bringing together of lived experiences of leadership and models of how leadership can be thought about. This dynamic sits in the *tok stori* relational space between leader and mentor. As leaders *tok stori* their experiences, mentors sensitized to the five key concepts of leadership and cognisant of context can help guide a pedagogical path towards deliberate leadership development. *Tok stori* conducted within this framework promotes a holistic mentorship which admits all three domains of the Melanesian mind. It does not place theory above experience, nor does it place the mentor above the leader. Instead, embedding leadership development in *tok stori* honours a leader's Melanesian experience and their environmentally socialized Melanesian mind.

## METHODOLOGY

After the leadership programme had been reviewed, FFM mentors were trained according to the model of leadership discussed above, and the revised *tok stori*-centred pedagogical navigation was made the core of mentor-leader interaction. Following their experience of *tok stori* within the programme, seven Melanesian leadership mentors were asked about their experience of the potential of *tok stori* as a pedagogical tool for people development. The data presented below is drawn from their reflections and was provided in response to three emailed questions and subsequent discussion.

1. How relevant for educational leadership in the Solomon Islands is the view that leadership can be seen in the *tok stori* of leaders?

This question interrogates the proposition that *tok stori* gives status to the experiential expertise of those involved. The question provides an opportunity to reflect on the way the approach legitimizes, values and exposes what is known by leaders about leadership, and addresses foundational matters upon which future leadership can develop.

2. How effective is *tok stori* as a pedagogy for Solomon Islands educational leaders?

The second question addresses the contextual appropriateness of the methodology in terms of the aims of leadership programmes. It provides an opportunity to reflect on the way using *tok stori* for leadership development structures a space for learning as well as discussion. This is an evaluative question.

3. How has your use of *tok stori* (philosophy, application etc.) in a Solomon Island leadership development programme impacted your own thinking/practice/understandings?

This third and final question addresses the potential of *tok stori* as a reciprocal experience by asking mentors about their own learning. The phrasing of the question includes alternatives to indicate the breadth of responses possible. This question provides processual opportunities for self-reflection.

Answers to all three questions were collated and thematically analysed. Purposeful sampling ensured the relevance of responses and guaranteed that, despite the small size of the sample, rich data emerged. A question-by-question analysis of the data is presented below.

## ANALYSIS

### Question 1: Issues of relevance

In answer to this questions, two issues of relevance are discussed.

#### Cultural relevance

Mentors understand *tok stori* as a culturally relevant form of social interaction within educational leadership development programmes in a Solomon Island context. A key aspect of this is the congruence between the oral nature of the form and what one participant called *a culture of oral tradition* of which it is a part. This alignment reflects the descriptions of *tok stori* and its place in wider Melanesian culture in the literature. Mentors counterpoint the oral focus and written literacy, the focus of education in the West, in three contextually significant ways: as preference, through skill and in time.

The oral focus which underpins *tok stori* is significant in a Melanesian leadership development context because of the choice-making of practicing leaders when in their own spaces:

> [T]oday's school leaders, they prefer talking and chatting to inform you about what they are doing rather than writing and producing reports.

In a context where engagement of Solomon Islander leaders is central, the mentor's response suggests *tok stori* as a positive way forward. A people development programme which meets participants on their own terms is likely to succeed, especially where prior experiences are legitimized as giving rise to expertise. Because in Melanesia, the cultural

value of oral language is higher than for written language, writing as a main pedagogical tool may not play to the strengths of leaders whose practice in oral communication has been under daily development for a long time. *Tok stori*, however, offers leaders an opportunity to use a preferred mode of communication and being as a basis of their own leadership development. Reflecting people's preference in methodology adds to a programme's pedagogical potential.

*Tok stori,* as a cultural activity, requires oral skills. Although high level writing skills are possible (and desirable and valuable) for school leaders, excellence in oracy is essential in Melanesia. Mentors recognize the high levels of oral skill possessed by leaders:

> In the Solomon Islands context, a lot of our leaders are very good at oratory skills. This is not belittling their writing skills but in the context of appreciating our oral traditions in Solomon Islands.

*Tok stori* can leverage these skills by creating an interactive relational space for oral interaction capable of delivering ideas and developing understanding. Where a leader's preferences and high oral skill level combine with a methodological approach, *tok stori* as a culturally relevant form for use in leadership development in Melanesia is validated.

Mentors understand *tok stori* as continuing to have contemporary cultural relevance in changing and turbulent times. This is despite the recognition that some oral traditions may gradually face displacement by writing. One mentor made the case for the temporal significance of *tok stori* thus:

> [O]urs is still a culture of oral communication. Thus, *tok stori* will remain an essential aspect of people's lives. Our transition into a writing culture will take a while before our society becomes a fully written society.

*Tok stori* in leadership development recognizes the oral strength of Melanesian cultures in the here and now. It "meets the people" where and when they are and offers an alternative to the priorities of other cultural traditions.

## Personal relevance

Mentors understand that personal relevance contributes to the usefulness of *tok stori* as pedagogy. Because it is ubiquitous in the Pacific region, mentors socialized into Melanesian practices bring skills and familiarity which are valuable to *tok stori* as a mode of leadership development in leadership programmes. One mentor observed:

> *[T]ok stori* is something I am familiar with. Culturally, I use *tok stori* with family and relatives, every day, in the village.

Leadership development can benefit from the kinds of familiar family and village relationality implied in *tok stori*. An expectation of relational closeness can build a sense of shared purpose and mutual commitment, helpful in the mentor-leader relationship. This is important because the effectiveness of a relational pedagogy such as *tok stori* can be indicated by the intensity of relatedness experienced by those involved. This is possible where mentors see *tok stori* as personally relevant.

Mentors also recognize that a leader's personal familiarity with *tok stori* supports its relevance as a leadership development activity. Familiarity creates a sense of freedom, while the formality of interview, for instance, can restrict what leaders understand to be relevant.

> If allowed to speak with freedom and without intimidation in any form, then Solomon Islanders will speak comprehensively and cover a wide area in their storying.

Familiarity with *tok stori* as a practice encourages leaders to bring what is personally relevant to *tok stori*. This can include information relevant to all three domains of the Melanesian mind as well as conflicts leaders have experienced between domains. As a result, both participants and mentors can explore lived experiences of leadership rather than a subset of experiences restricted by an uncertain understanding of the methodology in use. The effect is that:

> *Tok stori* leadership creates confidence and trust and [is] not threatening [to] people's opinions.

Compared to the initial proposal for an outcome-focused semi-structured interview methodology, mentors understand a *tok stori* approach as producing a more balanced experience of power. This has the potential to create a space for trust where what a leader thinks is legitimized and thus more likely to be voiced.

**Question 2: Issues of effectiveness**

On the question of effectiveness, three aspects of effectiveness are discussed.

**Effectiveness indicated by results**

Mentors describe evaluation performed in-situ as contributing to the effectiveness of *tok stori* as a pedagogical tool. This suggests that the effectiveness of *tok stori* is a matter of participation and deep engagement. The pedagogical effects of such engagement may take time because *tok stori* is a process. However, to set the stage for effectiveness, the relational tenor of *tok stori* needs to be understood at the outset. According to one mentor,

> Effectiveness is getting it right from the start; never mind how long it takes. Change is not immediate and instant but getting it right is paramount. Getting it right with school leaders, school leaders understanding it and being willing and open to implement; this is effectiveness.

Understanding which leads to change can develop through *tok stori* because the process allows participants to embed new ideas into existing complex multi-domain "lived" schema. This process is supported by trust and the way *tok stori* invites a comprehensive appreciation of experience. Being effective by *getting it right* is a relational matter. Effective pedagogical *tok stori* is indicated by ownership. Where there is "more *tok* by the participants (say above 85%) then *tok stori* does take place". Mentoring encounters where the mentor feels constrained to gain certain responses by the demands of structure can undermine the ownership of leader-participants. Ultimately, in *tok stori* where deep relationality has developed, "people need to simply say to you, yea I know what you are talking about. That is effectiveness".

**Effectiveness as giving respect and building relationships**

Since to take part in *tok stori* is to inhabit a relational ontology, respectful relations are a key marker of effectiveness. Mentors understand the significance of trust in relationships for effective *tok stori*:

> In reflecting on our *tok stori* with Solomon Island educational leaders... it is very important to build a trusting relationship between educational leaders and researchers or mentors or helpers.

Mentors describe *tok stori* as a relationally enabling experience, a process where respect leads to trust which can inspire actions for change:

> The *tok stori* has added value to our being with our people in a manner which accords respect to them as leaders. Doing so allows leaders to show respect to those whom they trust and would [be likely to] make change happen.

Mutually beneficial respectful relationships are intertwined with the kinds of reflection which can stimulate change. Where *tok stori* is embraced as a pedagogical tool, relationships can be configured so that leaders are "impowered" (Nakhid, 2003, p. 304), that is, invited into a space where the power they have over their own lives and understandings is acknowledged and fulfilled.

A further indicator of the effectiveness of *tok stori* is the emergence of rich data, capable of thick description (Geertz, 1973). An example of this is when trust leads to contextual interpretation of negative leadership experiences. Experienced mentors understand the effectiveness of *tok stori* in this regard by comparison to other methodologies:

> You get more and richer information in *tok stori* than with interviewing. In addition to that, once you form a relationship of trust, you can advise or even they will easily share with you about their struggles.

This is not surprising if an interview is understood as "relationship between two people where both parties behave as though they are of equal status for its duration, whether or not this is actually so; and where, also, both behave as though their encounter had meaning only in relation to a good many other such encounters" (Benney & Hughes, 1956, p. 142). *Tok stori* connects those involved more deeply, more authentically and without time limit. Consequently, despite its ubiquity, the stakes are higher. The consequence of deep relational investment is greater potential for pedagogically framed change.

### Effectiveness as creating a safe space

*Tok stori* is a relational activity which takes place in time and space. The way relationships exist in time and the cultural inflections or nuances of the *tok stori* space distinguish it from many other pedagogical forms. A sense of safety built on relational trust can flow from relationally-focused storying which takes time and skill to develop and is dependent on a shared understanding of *tok stori* as a relevant form of pedagogical interaction.

> *[T]ok stori* is a creation of space for people to tell their own *stori*. That created space is important because it is from there that an educational leader is to tell their *stori*.

Safety to reveal oneself is an essential element in telling one's story: conflicts between individuals, conflicting demands for loyalty from the domains of culture (*kastom*), church and formalized institutions, and the whole gamut of experience, positive and negative, are involved. The qualities of the *tok stori* space can be evaluated in-situ through sensitized, reflective mentoring. One mentor noted that:

> [T]he extent to which a leader shares about what is important to them depends very much on how the environment and climate for *tok stori* is created and built.

This places onus on leadership mentors to be well-versed in *tok stori* and have a secure grasp of an appropriate model of leadership. It demands that funders and programme organizers invest the time and cultural understandings required to support mentors in their endeavours.

**Question 3: Issues of reflection**

In answering this question, two issues: mindset and cultural data gathering, are discussed.

**Reflection on mindset**

Mentors are able to reflect on their own use of *tok stori* and the way advocacy for *tok stori* in leadership development affects them. This is unsurprising since *tok stori* is an interactive, relational process which aims to be mutually beneficial. The disturbance posed to previously held ideas about leadership development is a key benefit of aligning leadership practice with *tok stori* in Melanesia. One mentor explained this directly:

> Up until my use of *tok stori* in leadership development, my own approach to improving leadership has been quite linear... This was an important realisation for me, that reality is not lineal. Reality is complex. Having understood this, we began to look for different ways of supporting leaders in their own contexts [so as] to be of help to them as mentors.

*Tok stori*, therefore, can have catalytic power in shifting the mindset of Melanesian mentors, harnessing the complex understanding of lived reality of the Melanesian mind, and encouraging access of culturally founded expertise. This is possible because *tok stori*

> [Is] a way of thinking. It is a way of life. It is how we live, how we read, scrutinize and analyse whoever is asking us, questioning us, or campaigning for us.

Because it is ubiquitous in Melanesian life, *tok stori*, when admitted into non-traditional contexts by sensitive programme design, can reorganize conceptual as well as methodological matters.

Mentors gain from the experience of practicing *tok stori* in leadership development. This involves learning about the form through its placement in a new context, as well as experiencing the way time in *tok stori* redefines pedagogical relationships:

> I have learned a lot using *tok stori*. It has broadened my personal perceptions about many things. One area is the contextual knowledges and experiences. Why? Because *tok stori* is a two-way process [which] happens simultaneously. The process is instant and responsive. It involves pausing, questioning to understand and reflecting on what is being shared.

This response suggests that mentors, conscious and deliberate in their participation in *tok stori* as pedagogy, can appreciate at increased depth the contextual nature of what is known as it has been experienced by those storying. This has the potential to increase mentor's future expertize in harnessing the pedagogical potential of *tok stori*. In addition, because the *tok stori* process requires the deep commitment of mentors in space and time, mentor engagement intensifies the relationality between leader and mentor. When this is

the subject of reflection, more understanding about the processes involved can be gained by mentors.

### Reflection on cultural data gathering

Mentors identify *tok stori* as an appropriate cultural tool for gathering data in three ways: legitimacy or ownership, comfort and depth. Firstly, legitimacy. One mentor explained a new understanding of *tok stori* as a legitimate research activity as a result of experiencing it in a pedagogical setting:

> I appreciate *tok stori* more as a form of obtaining legitimate, people-owned data and information from our people in a medium they are comfortable with and [which] is part of their life and culture.

Naming *tok stori* as the basis of a leadership programme helps Melanesian leaders to identify *tok stori* as pedagogy as a process which they can own and use in leadership. This is because indications of legitimacy honour Melanesian culture and advocate for its value. Leadership development which ignores contextuality is unlikely to gain situationally-soaked maximally useful data or provide a path from leadership development into contextual leadership practice.

Mentors understand that *tok stori* as a pedagogical tool can enhance the levels of comfort experienced by leaders with the beneficial effect of providing rich data. For instance:

> *Tok stori* empowers our people as it provides an opportunity for our people to provide data in the comfort of their own contexts (home, school, house, village etc). When our people are comfortable, they will share from their hearts.

When people are comfortable, they are likely to reveal the intricacies and difficulties of their lives. Comfort is linked to culture because it is a state of satisfaction promoted by a holistic understanding of a situation which offers the assurance that one's conduct and understanding are appropriate and appreciated. Discomfort, by contrast, can be created by a sense of uncertainty, confusion, unfamiliarity or relative powerlessness:

> If questions were asked (as in semi-structured interviews) about sensitive topic areas, responses appear to be tardy. The *tok stori* approach, however, enabled a free-flowing conversation.

This contrast reiterates mentors' appreciation of the Indigenous approach of *tok stori* compared to an approach from non-Melanesian culture. Gathering information which has a cultural basis through a mode embedded in that culture is logical. This logic can promote full, comfortable participation.

Finally, leaders reflexively observed the depth of self-knowledge gained from involvement in *tok stori* as pedagogy. Where full participation takes place, self-awareness can result. This is important in a leadership model which sees the elements of leadership as including: the person as leader; their actions; their reference point or "True North"; and their development. Self-awareness is essential for leaders to appreciate the way personally-centred elements of leadership exist in culturally, cosmologically and institutionally defined contexts. Without self-awareness, new knowledge and experiences will remain as superficial learnings of limited use, rather than deep appreciations of the potential of the self to contribute to leadership:

> The *tok stori* approach also enabled, on the leader's part, a self-exploration of what they may have said on the surface but that which required further attention.

The processual nature of *tok stori* and leaders' levels of comfort as expert practitioners in *tok stori* have the potential to support continued self-investigation and ongoing leadership development.

In the next section, we restate the findings of the study and discuss their ontological and relational implications for donor-funded programmes in Melanesia.

## DISCUSSION

*Tok stori* is an everyday reality in Melanesia; hence its relevance for Melanesian leadership development programmes. This relevance is at two levels. First, at a cultural level, *tok stori* is preferred in Melanesian leadership development contexts because it affirms leaders and respects them on their own terms. Additionally, *tok stori* enables Melanesian leaders to use their strengths in oral communication for their further leader development. Because Melanesian leaders already have well-developed oral skills, they can then focus on developing higher-level leadership capabilities using *tok stori*.

Second, at a personal level, *tok stori* is very relevant for Melanesian leaders. As stated, leaders use *tok stori* daily within family, school and in village settings. Leaders prioritize *tok stori* because of its relational value and its potential for enhancing shared purpose and mutual benefit. Because they are familiar with *tok stori*, leaders are encouraged to be themselves, remaining true to their own cultural identity. As themselves, they can share their lived joys and lived sorrows easily and trustingly with others.

The cultural relevance of *tok stori* for leadership development programmes in Melanesia diverges from often-used donor leadership development programme strategy, practice and research. Perhaps this mismatch is a crucial element in the recurring failure experienced in the post-training implementation of donor-devised approaches as lamented by Sanga (2009). It may well be that international donors and Pacific Islands stakeholders involved in leadership development programmes would benefit by extending their own boundaries to embrace *tok stori* leadership and pedagogy. Operationally, because *tok stori* is not yet commonly used in donor-funded leadership development programmes, the activity of donors and other stakeholders in adopting *tok stori* may support its theoretical and practical development in international development settings.

On the question of the effectiveness of *tok stori* pedagogy for Melanesian leadership development, we argue that *tok stori* is effective in three ways. First, *tok stori* permits deep engagement by *tok stori* actors. This enables Melanesian leaders to own their authentic leader development ideas and actions where these are derived from and related to their existing complex "lived" schema of leadership. Second, because *tok stori* inhabits a relational ontology, it is effective in fostering respectful relationships with Melanesian leaders. As a relationally enabling process, *tok stori* encourages trust to be built among *tok stori* actors, thereby stimulating further development change for leaders. Third, as a relational activity, *tok stori* is effective because it creates safe spaces where deep conversations can take place. Conversations of this nature enable deepening understandings to be reached between mentors and leaders.

Numerous donor-supported leadership development programmes continue to take place throughout Melanesia. The delivery effectiveness of such programmes is often assumed and not demonstrated. When effectiveness is assessed, it is often measured in managerial and organisational terms. In the end, measures of effectiveness for leadership development programme pedagogy become matters of donor-focused politics, choice, epistemology and methodology. Given this study's findings, perhaps as yet unconsidered ways of effectiveness might be embraced. International development programme design might consider seeking effectiveness through *tok stori* so that it is reflective of the Melanesian mind. This kind of change requires a rethink, beginning with valuing the people-returns of programmes for Melanesia.

In examining how *tok stori* affects Melanesian mentors, we point to impacts at two levels. First, the application experience of *tok stori* in a donor-funded leadership development programme has shifted mentors' mindsets about and towards appreciating culturally founded knowledge, expertise, and pedagogy in international development programmes. In addition, mentors deemed their experience as valuable learning, capable of enhancing their future expertize by harnessing the pedagogical potential of *tok stori*.

Second, Melanesian mentors see *tok stori* in leadership development programmes as an appropriate cultural tool. Having applied *tok stori* as a research tool, mentors found *tok stori* to be legitimate and honouring of Melanesian culture. *Tok stori* is empowering to Melanesian leaders because it enhances their cultural comfort, which in turn leads them to greater openness in sharing their leadership in its intricacies and difficulties with mentors. Moreover, Melanesian mentors see the appropriateness of *tok stori* for its potential to increase the depth of self-knowledge and personal development.

An examination of donor-funded leadership programmes in Melanesia will show that these programmes do not capture the personal learning of mentors, programme trainers or developers. If personal learning is documented, often it is that of programme participants and not mentors. Given the valuable insights of the personal learning of Melanesian mentors, perhaps donors and other stakeholders might include researching mentor learning as an integral part of international development programmes. Indeed, perhaps inclusion of personal learning which engages our understanding of the Melanesian mind beyond managerial and organizational learnings can be explored in donor programmes. Ultimately, a desirable future is one where donors are engaging with the Melanesian mind in programme spaces.

## CONCLUSION

The title of this article, "Melanesian *Tok stori* in leadership development: Ontological and relational implications for donor-funded programmes in the Western Pacific", suggests what is at stake in making culturally-mediated changes in leadership (and other) programmes, funded and otherwise, in Melanesia. Different people legitimately and inevitably have different world views, but issues which derive from ontology in intercultural contexts revolve around the qualities of relationships. The relationship between donors and programme recipients has been implicitly addressed through a consideration of what happens when the cultural wisdom of recipients is embraced in a donor-funded context. Well-meaning imported understandings which do not deliberately honour place-based thinking can draw accountability borders around programmes erasing much of what could count: already held, contextually developed expertize as a

programme resource; the development of leadership across all those involved in a programme as an outcome; and learning about the world views of others as a contribution to inter-cultural understanding. Through *tok stori*, this article has demonstrated that the aims of donor-funded programmes, if suitably reframed and re-actioned, can be attained through Indigenous means. Where there is a lack of relational equity, the imposition of thought and action which reflect the ontology of donor-culture can result in a loss of potential gains for all. However, where those developing and enacting programmes inhabit a negotiating space (Mila-Schaaf & Hudson, 2009) capable of appreciating and valuing ontological difference, the harnessing of everyday cultural practices offers a rich navigation in many donor-supported fields, including leadership development. This story of *tok stori* in Melanesia offers a vibrant example.

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# Accessibility to schooling on small islands: An exploratory study of local options and opportunities on Kangaroo Island, South Australia*

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*Families living on small islands face limited options for the school education of their children. This exploratory study on Kangaroo Island, South Australia, considers some of the issues they face and the choices they make. It is based on informal, semi-structured interviews with parents, grandparents and children. Results show that all informants want students to be successful at school, gaining the life-skills, knowledge, and maturity to succeed in vocational or university education, and obtaining satisfying employment. While some believe that schooling on the Island is inadequate for achieving these goals, they also recognize the unique benefits of living on the Island. They, therefore, want the best of both worlds: education that equips their children for success in a global world, along with a deep grounding in local values, including the interdependence that exists within and between extended families, and the sense of security and belonging their children gain from family and community networks. Most families we interviewed believe they have been able to achieve a functional syncretism between the global and the local, albeit in a variety of different ways.*

*Keywords: isolated schools; small island schools; accessibility to education*

## INTRODUCTION

The challenges of accessing effective school education on small islands are often considered within the broader framework of remote and isolated education, especially in Australia where outlying schools are more likely to be separated by desert than water. Research in this area, however, has tended to focus on teacher recruitment and retention, and more generally on service delivery (e.g., Downes & Roberts, 2017; Drummond & Halsey, 2013; Kelly & Fogarty, 2015). Little attention has been given to the challenges faced by parents and children. Yet families living in remote settings, including small islands, face a range of issues when evaluating options for the school education of their

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children. There may be only one school, often with multi-grade classes, administered by a central bureaucracy with limited knowledge of local conditions.

Based on their research in Western Australia, Wildy & Clarke (2009; 2012) identified several of the key challenges confronting parents and children in such contexts. First, they posit an assumption of deficit in remote schools. This can derive not only from the central bureaucracy and the teaching staff but also from the local community; that is, there is a general culture of acceptance by families in remote and isolated communities that their children will perform less well than those in metropolitan schools. Mediocrity is often the accepted norm. These expectations are confirmed by research that consistently shows students in such communities having lower performance on PISA (Programme for International Student Assessment) tests of literacy and numeracy (Sullivan, Perry, & McConney, 2013).

A second challenge arises from teacher recruitment and retention. Put simply, small school staffing profiles are seldom conducive to achieving the full potential of students (Wildy & Clarke, 2012). Roberts (2014a), writing from an Australian perspective, highlights the problems of attracting and retaining quality staff:

> Unfortunately, rural schools experience a persistent turnover of staff, staff shortages, an inappropriate number of newly-qualified staff, fewer experienced staff to act as mentors, and a lack of staff in specialist subject areas. (p. 136)

Add to this the fact that children in multi-grade classes in small schools may have the same teacher for two or three years, or more, thereby posing a dilemma for parents if that teacher is not effective in nurturing the learning of their child. With limited staff and financial resources in small schools, there is also the issue of lack of access to the range of extra-curricular activities that are normally available in metropolitan schools.

A third challenge identified by Wildy & Clarke (2012) is more subtle: the cultural dissonance that can occur between teaching staff and the community. The norms, values, beliefs and behaviours evident in the local community may be quite different to those of the leaders and teachers in the school, and little understood by them. Roberts (2014a, p. 143) suggests that school leaders and teachers are likely to bring with them the "metro-centric assumptions" of the education bureaucracy, assumptions that are based on "a scientistic-technical view of education that ignores the situated enactment of all effective learning". Roberts (2014a) continues:

> [A]n approach used in one school in a metropolitan centre, or a highly effective teacher in a metropolitan centre, are not necessarily applicable in another context, such as a rural or remote school. (p. 143)

Roberts (2014a) then introduces the concept of "localism", suggesting that a school policy structure that allows local flexibility and reinterpretation is appropriate in many remote and isolated settings. He refers to this as "place-conscious" education, arguing for "spatial justice" in the provision of education in remote schools (Roberts, 2014b). By this he means that the school curriculum should be driven by the needs of local communities, defined in their own terms. This is a controversial suggestion, given that the Australian Government recently has developed a new, standardized, national curriculum (Brennan, 2011). There is an inherent tension between the localism advocated by Roberts, and the national focus inherent in the new curriculum. As Roberts (2014b) himself expresses it:

> The tacit implication... that the same knowledge is necessary and desirable for all students fails to recognise that place renders some kinds of knowledge more valuable and useful than others. Consequently, rural student dis-engagement and under-achievement can often be a function of a perceived lack of relevance or due recognition of the nature and value of place-based knowledge. (p. 51)

This idea of tension between the local and the national in the delivery of education has a parallel in the visionary UNESCO report, *Learning: The treasure within* (Delors et al., 1996), that identifies a series of tensions underlying most current educational policy and planning, including the tension between the local and the global. Writing from a Pacific perspective, Teasdale (2005) identifies the tension between the local and the global as one of the key challenges facing educators in the small island nations of Oceania. He believes this tension need not be dysfunctional. Rather, he argues for a dynamic syncretism between the local and the global that enables young people to grow up with the skills and confidence to live successfully in a globalizing world, while still maintaining a clear sense of their own local cultural identity (Puamau & Teasdale, 2007). A similar syncretism may well be achievable between the localism and nationalism described by Roberts.

Certainly, local norms and values need not be antithetical to the effective delivery of education in isolated schools. Williams-Diehm et al. (2014), for example, writing from a US perspective, argue that they are assets that need to be explicitly nurtured by educators. They cite several positive cultural characteristics of small, local communities that can benefit the school: the strong interrelationships that exist within and between extended families; the sense of security, safety and belonging that children derive from close family and community networks; and the interdependence of isolated communities that encourages people to pull together, especially in supporting the school and the children who attend it. Corbett (2015) likewise refers to the resilience of small communities, and to the embeddedness of schools within their communities.

Undoubtedly there are also negative cultural characteristics in isolated local communities that can thwart the work of educators, such as: lack of motivation to change/improve; the exclusivity of sub-cultural groups (e.g., sporting, religious) and rivalries between them; acceptance of mediocrity; and the influence of social networks of power and influence.

In light of the above, what can parents on small islands do to facilitate effective learning for their children at school? How can they ensure that their children grow up with the skills and knowledge to live successfully in a rapidly globalizing world? These are certainly questions that exercise the minds of many parents on Kangaroo Island, South Australia, questions that we have sought to address in an exploratory study of accessibility to education, and the choices available to parents and their children.

## THE KANGAROO ISLAND STUDY

Kangaroo Island is a relatively large and diverse island geographically, with an area in excess of 4,400 square kilometres, yet is small in terms of population, having only about 4,400 permanent residents; that is, there is an average distribution of just one person per square kilometre. Almost 40% of Kangaroo Island comprises national and conservation parks. The remainder is mainly farmland, with cereal crops, sheep grazing and timber predominating. There are also several small, “boutique” rural industries, including

production of wine, honey, marron, olives, eucalyptus oil, and seafood. The economy is almost equally based on farming and tourism, the latter accounting for approximately 225,000 visitors per year.

There is one main township on the Island with a population of about 2,000, and three smaller townships, each with about 200 to 250 residents. There is only one school. Its main campus is in Kingscote (435 students) with smaller campuses in Parndana (160 students) and Penneshaw (60 students). Multi-grade classes are the norm, especially at the two smaller campuses. Families have little or no choice of who teaches their children. Some children may be taught by the same teacher for two or three years.

The school is a government facility administered by the South Australian Department for Education and Child Development. It has a fleet of buses that provides transport for students from outlying areas. Most senior secondary education (Years 10 to 12) is provided only in Kingscote, resulting in some senior students having a one-and-a-half hour commute each way to attend school. Opportunities for curriculum specialization are quite limited, especially in the senior years, notwithstanding the provision of some courses via distance education through the Adelaide Open Access College, and the availability of vocational training courses in specific areas, including civil construction, tourism, agriculture and business studies.

This study of accessibility to education has been carried out quite independently of the school. We have been looking from the outside in. The focus has been on parents and grandparents, and on the children themselves. What are the options and opportunities available to them? What are the key challenges they face in relation to schooling, and how do they resolve them? In order to address these questions, we chose an exploratory approach using informal, semi-structured interviews (Delamont & Jones, 2012). Participants were identified via our own social networks. Having lived permanently on the Island for almost a decade and having immersed ourselves in a range of different community groups, our networks are extensive and varied. As the study proceeded participants referred us to other families outside our networks.

We made a deliberate decision to keep interviews low key and informal. Many of the interviews were opportunistic; that is, we talked with people when and where we met them: in the main street; at local coffee shops; at the supermarket; on the ferry going to the mainland; at sporting and cultural events; and at the Sunday farmers' markets. We talked with others in the course of our commercial or professional interactions with them, and others again by telephone. Our naturalistic approach to interviewing was deliberate. We wanted our research to reflect the everyday social relationships of the Island, where people are comfortable, relaxed, and engaged. We were careful to assure participants that any information they provided would be treated confidentially. And we were careful to record the salient features of each discussion as soon as possible afterwards.

We found that families fell into at least four categories:

- Those that had made a deliberate decision to keep their children at the local school for the full 12 years of schooling;
- Those that had decided to send their children off the Island for all or part of their secondary school education, generally to boarding schools in the state capital of Adelaide;

- Those with younger children who were still grappling with decisions about the educational choices available to them; and
- Those whose financial circumstances gave them no choice but to keep their children on the Island for the duration of their school years.

We also discovered a few families that had made more radical choices:

- To home school their children; or
- To move the whole family to the mainland so their children could attend larger schools in a metropolitan centre.

Our data indicate that most parents give careful consideration to the options available to them, and that the extended family, including grandparents, and often the children themselves, are involved in discussions and decision-making. Central to these discussions is the question of finance. Any option other than remaining at the local school involves added expenditure for families. Even the option of home schooling requires at least one parent to forfeit opportunities for wage earning in order to educate the children. In some cases, it is the grandparents who agree to dip into their retirement savings and/or investments to fund the costs of off-island education. In other cases, children are able to win scholarships via a competitive examination and assessment process thereby reducing tuition and/or boarding expenses. Families living in the most remote parts of the Island are eligible for support from the Australian Government through its *Assistance for Isolated Children Scheme*. The scheme provides a boarding allowance of up to A$10,838 (in 2019) per child per year to facilitate attendance at schools on the mainland. Regardless of the source of funding, however, mainland schooling invariably involves financial sacrifice for families, and decisions about when, where and how to arrange it can be complex and challenging:

***When*:** Few parents can afford to send their children to mainland schools for the full six years of secondary education. Nor do many parents want to break up the family when children are still in their pre-teen or early teenage years. Typically, most families opt for the final three years of secondary school (Years 10 to 12). There have been at least two recent exceptions to this when children have won valuable scholarships covering all six years of secondary schooling.

***Where*:** Almost invariably, those opting for off-Island schooling send their children to the state capital of Adelaide, and generally to non-government schools. There is a wide range of options, from prestigious, high-fee schools with a strong emphasis on academic excellence, to relatively low-fee institutions, generally affiliated with a particular Christian denomination or educational philosophy. A small number of children attend government schools, including specialist schools that offer intensive curriculums in areas such as science, mathematics or music.

***How*:** A major challenge is the cost of travel and accommodation. Fortunately, there is an efficient coach/ferry service between Adelaide and the Island, allowing children to return home during holidays and mid-term breaks at relatively low cost. For most children, travel time is less than four hours each way. Accommodation is the big challenge. Most of the prestigious, high-fee schools have boarding houses that provide intensive care and supervision, albeit at a significant cost. Otherwise families need to arrange for children

to board with family or friends, or make arrangements through social networks, such as those affiliated with Christian churches.

In at least two recent cases, families have opted to move to the mainland for the duration of their children's secondary schooling, partly to avoid breaking up the family, partly for financial reasons (i.e., they see it as a cheaper option than sending children on their own). This has meant leasing or selling the family home on the Island and moving themselves and their possessions to accommodation close to the school(s) the children will attend. Such moves only appear feasible when at least one parent has the qualifications to find suitable employment in the new context or can transfer from their current position within the same employing entity.

Why do families make the sacrifice to send their children to the mainland for secondary schooling, or to uproot the entire family and move off the Island? The primary reason, cited by almost all interviewees, is to provide children with greater academic, social and sporting opportunities. From an academic perspective, parents believe their children will receive better quality teaching, greater choice of subject areas, opportunities to specialize in subject areas not available on the Island, and a stronger foundation for entry into university and subsequent employment. Socially, many parents commented on the need for their children to be part of a student cohort that values education and aspires to excellence. In some cases, parents also want their children to have opportunities to participate in a wider range of competitive sports, and a greater challenge to excel in them.

In a small number of cases, decisions about off-Island secondary education are dictated by family tradition. There are extended families that have been on the Island for several generations, having built up successful business or farming enterprises. Some of these families have well established links with particular non-government schools in Adelaide. Right from birth, there is an assumption that children will follow in the footsteps of parents and grandparents in attending these schools, and that grandparents may provide some financial assistance. An underlying but little articulated factor here is the social prestige or presumed social capital accruing from attendance at a particular school, and the potential employment and business opportunities that might flow from this in later life.

There were a number of other reasons mentioned by interviewees for sending children to mainland schools. These included: the impact and inconvenience of the very long daily commute to and from Kingscote; a belief that non-government schools in Adelaide manage adolescent behaviour and special learning needs more effectively; the variable quality of teaching on the Island, and an acceptance of mediocrity in some instances; concerns about peer pressure on the Island, especially in the context of alcohol, drugs. and sexual mores; non-government schools being perceived to be more supportive of the family's values; and the need for children to experience a larger social network and different ways of thinking.

Interestingly, a number of parents whose children had moved to Adelaide for upper secondary schooling emphasized the need for them to maintain their local cultural and friendship networks on the Island and went to considerable expense and inconvenience to bring them back to the Island regularly, especially to participate in competitive sports. In a few cases, older teenagers returned to the Island almost every weekend during winter

to play in their local sporting team. In response to further questioning, these parents talked of the need for their sons and daughters to gain a world-standard education while still maintaining the deeper values of their local community, values emphasizing loyalty, interconnectedness and mutual support. Overall, most families were happy with the schooling decisions they had made, and believed their children were getting the best of both worlds.

As noted earlier, financial considerations are central to family decision-making, and for many families the option of off-Island schooling is simply not a reality: family income and investments are insufficient, nor is extended family support available. However, we did speak with a number of families that could afford off-Island schooling but chose to keep their children at the local school. None of these families had made the decision lightly. The reasons for doing so were varied:

- Their children are happy on the Island, have well established social networks, enjoy the marine environment (sailing, fishing, swimming), and participate successfully in weekend sporting teams;
- Some parents are school teachers and believe they can provide additional learning and academic enrichment at home;
- On principle the parents have made a decision to live locally, use local services, including the local school, and are committed to supporting the local community, including the school, through volunteering;
- One small nuclear family (two parents; two children) values the close-knit nature of their relationship, stating: *We're all four deeply committed to keeping the family together and weathering the positives and negatives of local education*;
- Parents with one child accept her strong preference to stay on the Island because of youth leadership opportunities, and the value she places on her social networks;
- Two parents who work in the public sector expressed a strong philosophical commitment to supporting government education services and keeping their children in the local school;
- Some families value the opportunities for their children to gain work experience on the Island, either in family-owned businesses or farms, or in local supermarkets, restaurants and coffee shops, believing this helps develop independence, initiative and a sense of personal responsibility;
- Many parents also commented on their strong wish to keep the family together during the formative adolescent years, aiming to give their children the resilience to cope successfully with post-school education on the mainland.

There was one common theme to almost all of our conversations with families that could afford off-Island education but chose otherwise: the perceived social and cultural benefits of Island life. These include: the interdependence and mutual support that characterises social relationships; the sense of security, belonging and personal well-being that children derive from extended family and friendship networks; the greater resilience and maturity that children acquire from living in remote settings; and, in some cases, the opportunity for children to learn to live in a more environmentally responsible way. Families

genuinely believe that these benefits outweigh any perceived disadvantages of local schooling. As one child expressed it: *Life is good on the Island. Why move?*

Many of the parents also seek to create opportunities for children to gain life-broadening experiences away from the Island. School holidays offer scope for family holidays in major Australian cities, or even overseas; one family embarked on a twelve month around-Australia camping trip immediately prior to their children beginning secondary school; other families arranged short- or longer-term overseas student exchanges for their children. Sport also provides opportunities, with children attending coaching clinics, training workshops and tournaments of various kinds in Adelaide or beyond.

## CONCLUSION

Families living on Kangaroo Island face a range of issues when evaluating options for the school education of their children. All of the parents and grandparents with whom we spoke want their children to be successful at school, to gain the life-skills, knowledge and maturity to succeed in vocational or university education, and to obtain satisfying employment. Many feel that schooling on the Island is inadequate for achieving these goals. Yet, at the same time, they recognize the unique benefits for their children of living on the Island. They want the best of both worlds: education that equips their children for success in a global world, along with a deep grounding in local values, including the interdependence that exists within and between extended families, and the sense of security and belonging their children gain from family and community networks.

The essential challenge for families is to achieve a functional balance, or syncretism, between these two worlds, the global, and the local. In our exploratory study we found that families approach this challenge in a variety of ways. Some opt for off-Island schooling, especially at senior secondary level. Others make a deliberate decision to keep their children on the Island, but to provide learning support and life-broadening experiences. In either case there are significant issues to resolve. There are no easy answers. Yet many of the families in our study, regardless of the options they have chosen, believe it is possible to achieve a satisfactory resolution. Our study therefore adds credence to the idea that tension between the local and the global in the delivery of education (Delors et al., 1996) need not be dysfunctional, but that a dynamic syncretism can be achieved. Certainly, many young people on Kangaroo Island appear to be growing up with the knowledge and confidence to live successfully in a globalizing world, while still maintaining a clear sense of their own local Islander identity and values.

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# Perceptions of lecturers of student evaluations of their teaching

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*This descriptive study explored perceptions of lecturers of student evaluations of their teaching at the University of Malawi, Kamuzu College of Nursing. Data were collected from the entire population of lecturers (N=71). Descriptive statistics, t-test, and one-way analysis of variance were computed using SPSS to analyse the data. It was established that generally lecturers had a positive perception towards student evaluation of their teaching, and that their perception did not differ by age, sex, academic qualification, professional rank, or teaching experience. The study further revealed that lecturers' perceptions of student evaluations of their teaching was more positive when the purpose was formative. The study concluded that student evaluations of the lecturers' teaching was not a problem but the question to be answered was the purpose for which such evaluation should serve. It was, therefore, recommended that University of Malawi should harness the implementation of student evaluations of lecturers teaching while triangulating with other evaluation methods.*

*Keywords: quality assurance; teaching effectiveness, student evaluation, formative, summative*

## INTRODUCTION

The literature on student evaluations of lecturers' teaching suggests that whether a lecturers' teaching should be evaluated is not important; rather, what is important is who should do the evaluation, for what purpose, and by what means (Adeyemo, 2015; Iyam, & Aduwa-Oglebaen, 2005). Richardson (2005) noted that universities/colleges can evaluate lectures' teaching by: classroom observation, student ratings, student achievement, peer rating, self-rating, teacher interview, parents rating, competency tests, and indirect measures. However, of these approaches, student evaluation, though engrossed in controversy, has gained popularity globally as the primary source of assessing teaching in higher education (Atek, Salim, Halim, Jusoh, & Yusuf, 2015; Inko-Tariah, 2013).

Student evaluation of lecturers' teaching means that students, as consumers of instruction, are made to express their opinion and feelings concerning the effectiveness of the lecturers' teaching process and activities during the semester and the extent to which they benefited from the process (Idaka, Joshua, & Kritsonis, 2006). Barret (in Machingambi & Wadesanyo, 2011) noted that the formal student evaluations of their lecturers dates back to the 15$^{th}$ Century when students at the University of Bologna in Italy paid their lecturers according to their teaching abilities. Over time, universities in many developed countries, like the US and UK, and some developing countries, like Malaysia, have made

student evaluation mandatory and harnessed the practice at both undergraduate and postgraduate level to ensure quality of their educational systems (Alek et al., 2015; Igbojekwe & Ugo-Okoro, 2015). This seems to be concomitant with Remmer's conclusion (cited in Idaka, et al., 2006) that students' evaluations ought to be mandatory in every university/college because:

a) Student judgement as a criterion of effective teaching can no longer be waved aside as invalid and irrelevant;
b) Lecturers have no real choice as to whether they will be judged by those they teach, but the real choice any lecturer has is whether or not to use that knowledge in the teaching process;
c) The way higher education is organized and operated, students are pretty much the only ones who observe and are in a position to judge the lecturers' teaching effectiveness; and
d) No research has been published invalidating the use of student evaluations as one criterion of teachers' teaching effectiveness.

Iyam, and Aduwa-Oglebaen (2005) stress that student evaluation of lecturers' teaching can serve a range of purposes; both summative and formative. The formative function entails the improvement of classroom instructions, student learning, and fostering of professional growth of lecturers. The summative function includes use of results for administrative/personnel decisions, such as promotion, demotion, salary increase, dismissal, awards, and/or meeting public accountability demands. Thus, student evaluation of lecturers teaching can be regarded as a key step in the drive to improve the effectiveness of teaching and learning and raise the standard of education offered by universities.

Studies conducted in different countries and universities within countries of student evaluation of lecturers' teaching, especially in Africa, reveal that the lecturers' perceptions of student evaluations are somewhat mixed: in Nigeria and South Africa a number of studies show that lecturers do not generally accept student evaluation of their teaching (Iyam & Aduwa-Oglebaen, 2005; Mwachingambi & Wadesango, 2011; Yusuf, Ajidagba, Ayorinde, & Olumoun, 2010); but other studies show that in Nigeria, and in Kenya and Malaysia, lecturers agree that student evaluations of lecturers' teaching is necessary—however, teachers' positive perceptions mainly apply if the purpose is formative (Adeyemo, 2015; Idaka et al., 2006; Inko-Tariah, 2013; Gichinga, Mukulu, & Mwachiro, 2014). It is not clear whether the less favourable attitude of lecturers towards student evaluations is because they are apprehensive about the potential academic and professional inadequacies that may be exposed by student evaluations, or whether the lecturers are not convinced that university students are competent enough to evaluate their teaching.

Similarly, findings of studies of the influence of lecturers' characteristics on their perceptions of student evaluation of teaching vary. While in Nigeria, Idaka et al., (2006) found that the lecturers' perceptions towards student evaluation of teaching were significantly influenced by lecturers' academic discipline, professional status, and academic qualification. Adeyemo (2015), in the same country, found no significant difference in the perception of lecturers across gender, age, professional status, and work experience. A study that explored the lecturers' gender and their valuation of student evaluation of teaching in six public universities in Malaysia also found that there was no significant difference in terms of gender, although lecturers of both genders found student

evaluation of teaching more useful only for formative rather than summative functions (Atek et al., 2015). These variations in lecturers' perceptions towards student evaluation of teaching suggest that it is not possible to generalize the findings of studies from one university/country to the other.

In Malawi, concerns about quality of higher education in both public and private higher education institutions have compelled stakeholders to consider various tools and provisions for assuring quality, including the greater use of student evaluations of lecturers' teaching. Stakeholders have realized that, while universities/colleges periodically review their curriculums to offer relevant and competitive programs, such efforts are not enough to produce competent graduates because it neglects the effect of classroom interaction.

Currently, the general criteria for evaluating academic staff of universities/colleges is in three broad areas: teaching, research, and community engagements. However, the evaluation of lecturers in public universities in Malawi has, for a long time, given low priority to teaching, placing much emphasis on research publications. Igbojekwe and Ugo-Okoro, (2015) argue that the use of research publications and paper presentation at conferences as the main performance indicators for lecturers while neglecting their teaching effectiveness does little to promote excellence in teaching. It is no secret that the "publish or perish syndrome" sometimes result in some lecturers in public universities in Malawi compromising their primary responsibility of teaching. Consequently, teaching suffers, yet grades are awarded whether or not students are taught or guided to learn, raising concerns appropriately captured by Iyam and Aduwa-Oglebaen (2005) that "most undergraduate students may be merely certificated and not truly educated". Thus, monitoring the effectiveness of lecturers' teaching is a necessary part of any university/college that is interested in maintaining standards, because a lack of interest in what transpires in the classroom could be a serious factor in the quality of the graduates produced (Abdulrahman, Ayoride, & Olubode, 2010).

## PROBLEM STATEMENT

The Senate of the University of Malawi approved a new criterion for the promotion and merit increment of its staff in 2011 which incorporated the lecturers' teaching responsibilities and effectiveness. Data for the criteria would be collected, in part, from student evaluations of the teaching performance of lecturers (University of Malawi, 2011). However, a review of relevant literature shows that no study has been conducted to determine how lecturers feel about the use of student evaluations of their teaching as one way of determining their promotion and assuring the quality of their teaching in Malawi. Given the mixed results from previous studies on teacher evaluations, as discussed above, it is not possible to simply assume positive or negative feelings. The study reported upon in this paper explores the perceptions of lecturers to student evaluation of their teaching effectiveness in the Malawian context.

## PURPOSE OF THE STUDY

The purpose of this study was to explore the perceptions of lectures towards student evaluations of their teaching effectiveness at the University of Malawi, Kamuzu College of Nursing. To achieve the purpose, the study sought to answer five questions:

1. What is the perception of lecturers to student evaluation of their teaching effectiveness?
2. Do the lecturers' perceptions differ significantly based on age, gender, academic qualification, professional rank, and teaching experience?
3. What formative functions should the results of student evaluations of teaching serve?
4. What summative functions should the results of the student evaluations of teaching serve?
5. To what extent does the purpose/use of evaluation results influence the perception of lecturers towards student evaluation of their teaching?

## SIGNIFICANCE OF THE STUDY

The findings of the study will contribute towards strengthening the country's initiatives towards assuring the quality of higher education in Malawi. Understanding the feelings and attitudes of lecturers to student evaluation of their teaching effectiveness is likely to trigger further discussions about issues of improving teaching and learning in higher education. The lecturers' voice and active consideration of such issues would contribute towards the acceptance of results from student evaluation and improve implementation of student evaluation of the lecturers' teaching. Generally, it is only when lecturers themselves understand the value of students' evaluations of their teaching, that such processes can be meaningfully implemented.

## METHODOLOGY

The study adopted a quantitative, descriptive survey design, which sought to collect information on respondent's knowledge, opinions, attitudes, and values; this information was then examined to detect patterns of association relevant to the research questions (Bryman, 2008). Specifically, the study investigated the phenomenon of student evaluation of their lecturers' teaching by obtaining the opinions or perceptions of lectures, and determining the associations between their perception and a range of variables.

The study was conducted at Kamuzu College of Nursing (KCN), a constituent college of the University of Malawi. The University of Malawi has four constituent colleges; apart from the KCN, there are Chancellor College, College of Medicine, and The Polytechnic. The selection of KCN was determined by logistical and financial constraints. The total number of lecturers at KCN, according to the college registrar's records, is 71. Because this population was manageable, all lecturers were included in the study.

The research instrument "Lecturer Response to Students Evaluations of Teaching (LRSET)" questionnaire, developed by Iyam and Aduwa-Oglebaen (2005) with a Cronbach Alpha reliability coefficient of 0.917, was administered to generate data for the study. This questionnaire has also been used by a number of studies in Nigeria and Benin (Idaka et al., 2006; Iyam & Aduwa-Oglebaen, 2005), South Africa (Machigambi & Wadesango, 2011), and Malaysia (Sulong & Hajazi, 2016). The questionnaire consisted of 20 items scored on a four-point Likert scale: Strongly Agree, Agree, Disagree, and Strongly Disagree, and weighted 4, 3, 2 and 1 respectively. The items 1-10 covered the general need for student evaluation; items 11-15 elicited information on the formative purposes; and items 16-20 focused on the summative purposes of student evaluation.

The questionnaire was self-administered, and it was physically delivered as well as sent electronically to all the lecturers at KCN (N=71). Fifty-two lecturers completed and returned the questionnaires, representing a response rate of 73.2%.

The data for the study were entered and analysed using the Statistical Package for Social Scientists (SPSS 22.0). Descriptive statistics, particularly percentages, were used to analyse data relevant to research questions 1, 3, and 4. To analyse data relevant to research question 2, data from items 1–10 on the questionnaire were used to compute the mean score for the need for student's evaluation of lecturers teaching. Thereafter, an independent t-test was run to ascertain whether the lecturers' perceptions differed significantly based on gender (male/female) and academic qualification (Master's Degree/Doctoral Degree). The F-test (one-way analysis of variance) was also computed to test whether the lecturers' perceptions differed significantly based on age (<40 year, 40-49 year, and >50 years), professional rank (associate professor, senior lecturer and lecturer) teaching experience (<5years, 5-9 years, 10-14 years, and >14 years); bachelor's degree and associate lecturer were excluded from the analysis because there was only one case. The study also computed the mean score on formative and summative function of students evaluations of lecturers' teaching, which was used to run the dependent (paired sample) t-test statistical technique to answer research question number 5.

## RESULTS OF THE STUDY

### Demographic profile of respondents

Descriptive statistics were generated to capture the demographics of the respondents.

**Table 1: Demographics of respondents**

| Characteristics | | N | % |
|---|---|---|---|
| **Gender** | Male | 14 | 26.9 |
| | Female | 38 | 73.1 |
| **Age** | < 40 years | 9 | 17 |
| | 40 – 49 years | 23 | 43.4 |
| | >= 50 years | 20 | 37.7 |
| **Academic qualifications** | Doctoral Degree (PhD) | 18 | 34.6 |
| | Master's Degree | 33 | 63.5 |
| | Bachelor's Degree | 1 | 1.9 |
| **Professional status/rank** | Professor | 0 | - |
| | Associate professor | 5 | 9.6 |
| | Senior Lecturer | 19 | 36.5 |
| | Lecturer | 27 | 51.9 |
| | Associate lecturer | 1 | 1.9 |
| **Work experience** | < 5 years | 10 | 18.9 |
| | 5 – 9 Years | 15 | 28.3 |
| | 10 – 14 years | 7 | 13.5 |
| | >15 years | 20 | 38.5 |

As shown in Table 1: 73.1% of respondents were female; out of 52 respondents, 17% were below the age of 40, 43.4% were within the range of 40-49 years, and 37.7% were 50 years and above; 34.6% were holders of a doctoral degree, 63.5% had masters degrees, and 1.9% possessed a Bachelor's degree. Those holding only a first degree were assistant lecturers involved in offering tutorials since university policy is that lecturers must hold

a masters level degree; however, they were included in the study because they are also involved in teaching. Among the respondents, 9.6% were associate professors, 36.5% senior lecturers, 51.9% lecturers and 1.9% associate/assistant lecturers. There were no professors (i.e. the college has only one professor). In terms of work experience: 18.9% of the respondents had worked for less than five years; 28.3%, 5–9 years; 13.5% 10–14 years; and 38.5% had 15 and more years of experience.

### Perception of lecturers towards students' evaluations of their teaching

Items 1-10 on the questionnaire were used to examine the perception of lecturers towards student's evaluation of their teaching. The results are presented in Table 2. Noticeably, most of the items (7 out of 10) were rated positively. This means that the respondents had a generally positive perception concerning student evaluation of their teaching. The analysis also revealed that there were some reservations on items 5, 8, and 10 that focused on punctuality, commitment, and discipline.

**Table 2: Examining perception of Lecturers to Student Evaluation of Teaching**

| No. | Item | SA | A | D | SD |
|---|---|---|---|---|---|
| 1 | The idea of students evaluating their lecturer is acceptable. | 31 (59.6%) | 21 (40.4%) | 0 | 0 |
| 2 | University students are responsible enough to evaluate their lecturers. | 22 (42.3%) | 22 (42.3%) | 8 (15.4%) | 0 |
| 3 | Student possess good value-judgements to evaluate their lecturers. | 13 (25.0%) | 25 (48.1%) | 14 (26.9%) | 0 |
| 4 | Lecturers will be more prepared for their teaching if evaluated by students. | 28 (53.8%) | 16 (30.8%) | 8 (15.4%) | 0 |
| 5 | Lecturers will be more punctual to class if they know that their students will evaluate them. | 21 (40.4%) | 13 (25%) | 18 (34.6%) | 0 |
| 6 | Lecturers will be more transparent to students if they know that they will be evaluated by students. | 21 (40.4%) | 16 (30.8%) | 15 (28.8%) | 0 |
| 7 | Student evaluation of lecturers help to improve lecturer-student relationship. | 9 (17.3%) | 33 (63.5%) | 10 (19.2%) | 0 |
| 8 | Student evaluation of lecturers help lecturers to be more committed to their Job. | 11 (21.2%) | 23 (44.2%) | 18 (34.6%) | 0 |
| 9 | Lecturers will be more innovative in their teaching if they are evaluated by their students. | 17 (32.7%) | 20 (38.5%) | 15 (28.8%) | 0 |
| 10 | Lecturers will be more disciplined generally if they know that their student will evaluate them. | 9 (17.3%) | 23 (44.2%) | 19 (36.5%) | 1 (1.9%) |

With regard to the acceptability of students evaluating their lecturers, all respondents affirmed the idea that students evaluating their lecturers was acceptable (40.4% Agree and 56.6% Strongly Agree). Students were viewed as responsible enough to evaluate their lecturers by the majority of respondents (84.6: 42.3% Agree and 42.3% Strongly Agree). On whether students possess good value judgement to evaluate their lecturers, most respondents were fairly positive as they agreed with the statement (48.1%), while 25% were very positive, as they Strongly Agreed, but 26% of the respondents Disagreed. The results further revealed that 89.6% of the respondents, comprising 58.8% and 30.8% who Strongly agreed, and Agreed respectively, were of the opinion that lecturers would be more prepared for their teaching if evaluated by students. Similarly, 40.4% and 30.8% of the respondents Strongly Agreed and just Agreed, respectively, to the statement that lecturers would be more transparent to students if they knew that they would be evaluated by them. This culminates into the total to 71.2% who were positive and 28.8% of the respondents who were negative to the statement. There was also agreement among respondents (80.8%) that student evaluation of lecturers would help to improve the lecturer-student relationship. Of these, 63.5% Agreed with the statement while 17.3% Strongly Agreed. In addition, 71.2% of the respondents, comprising 38.5% and 32.7% who just Agreed and Strongly Agreed with the statement, respectively, were of the opinion that the student evaluation of lecturers teaching would make lecturers more innovative in their teaching, although some respondents (28.8%) did not agree.

Items that indicated that student evaluation of lecturers teaching would make lecturers punctual for class, more committed to their job, and more disciplined had, relatively, the lowest positive perception: 65.4%, 65.4% and 61.5%, respectively. Although, 40.4% Strongly Agreed and 25% Agreed with the statement that lecturers would be more punctual to class if they knew that their students would evaluate them, the respondents that were negative about the statement were also substantial (34.6%). Similarly, 34.6% of the respondents poorly rated the view that lecturers would be more committed to their job if they were evaluated by students; however (65.4: 21.2% Strongly Agree and 44.2% Agree) with the statement. A sizable number of respondents (36.5%) were also negative to the statement that lecturers would be more disciplined generally if they knew that their student would evaluate them, although the majority of the respondents felt this was true (,17.3% Strongly Agree and 44.2% Agree).

Therefore, it was concluded that the overall perception of the respondents to student's evaluation of the lecturers teaching effectiveness was generally positive, although there were some reservation with other aspects of the student evaluation.

**Determining whether the lecturers' perception differed significantly based on age, gender, academic qualification, professional rank, and teaching experience**

Data from items 1-10 on the questionnaire were used to conduct an independent t-test for ascertaining whether lecturers' perception differed significantly based on gender and academic qualification. The study also computed an F-test (one-way analysis of variance) to test whether lecturers' perceptions differed significantly based on age (<40 years, 40-49 years, and >50 years old), professional rank (associate professor, senior lecturer and lecturer), and teaching experience (<5 years, 5-9 years, 10-14 years, and >14 years). The results of the analysis are presented in Table 3.

**Table 3: Determining whether the lecturers' perception differ significantly based on age, sex, academic qualification, professional rank and teaching experience**

| Selected characteristics | | Mean and SD | N | Statistic | Df | P-value |
|---|---|---|---|---|---|---|
| **Age** | < 40 years | 80.3 ± 10.1 | 9 | $F = 1.126$ | 2 | 0.333 |
| | 40 – 49 years | 74.6 ± 17.4 | 23 | | | |
| | >= 50 years | 80.6 ± 10.9 | 20 | | | |
| **Gender** | Male | 80.8 ± 14.5 | 14 | $t = 0.890$ | 50 | 0.378 |
| | Female | 78.8 ± 14.0 | 38 | | | |
| **Academic qualification** | Doctoral Degree (PhD) | 76.6 ± 15.3 | 18 | $t = 0.389$ | 49 | 0.699 |
| | Master's Degree | 78.2 ± 13.7 | 33 | | | |
| **Professional rank** | Associate professor | 78.4 ± 17.9 | 5 | $F = 0.407$ | 2 | 0.668 |
| | Senior Lecturer | 79.8 ± 14.2 | 19 | | | |
| | Lecturer | 76.0 ± 13.8 | 27 | | | |
| **Work experience** | < 5 years | 79.6 ± 12.4 | 10 | $F = 0.647$ | 3 | 0.589 |
| | 5 – 9 Years | 77.9 ± 14.5 | 15 | | | |
| | 10 – 14 years | 71.1 ± 17.1 | 7 | | | |
| | >15 years | 79.5 ± 14.1 | 20 | | | |

As shown in Table 3, the mean and standard deviation for each category on age was 80.3±10.1, 74.6±17.4, and 60.6±10.9, respectively, and the statistical results was $F = 1.126$, $p > 0.05$. This means that there was no difference in the perception of the lecturers to student evaluation of their teaching in terms of age. The mean and standard deviation for males was 80.8±14.5, and females was 78.8±14.0 and $t\ (50) = 0.890$, $p > 0.05$, denoting that gender of respondents did not influence their perception towards student evaluation. Similarly, there was no difference in the respondents' perceptions in terms of academic qualification. The mean and standard deviation was: doctoral degree 76.6±15.3; masters degree 78.4±13.7 and $t\ (49) = 0.699$, $p > 0.05$. The perception of respondents to student evaluation of the lecturers' teaching across the professional ranks was also the same ($F = 0.407$, $p > 0.05$) and no significant difference was found in terms of work experience ($F = 0.647$, $p > 0.05$). It was concluded that age, gender, academic qualification, professional rank, and work experience of the respondents did not have an influence on their perception towards student evaluation of the lecturers' teaching.

### Formative function of Student Evaluation of the Lecturers Teaching

Items 11-15 from the questionnaire were used to capture the perceptions of lecturers on the formative function that student evaluation of the lecture's teaching should serve, shown by Table 4.

Clearly respondents positively perceived that results of student evaluations of lecturers' teaching should serve formative purposes because all the five items that sought their opinion of the formative functions of the students' evaluation were highly positively rated. The respondents attested that student evaluation of lecturers' teaching should help lecturers to improve their teaching (100%), improve classroom instruction (84.3%), improve student learning (100%), and assess the needs of learners (84.6%) as well as self-evaluation of the lecturers (100%).

**Table 4: Formative Function of the Student Evaluation of the Lecturers' Teaching**

| No. | Item | SA | A | D | SD | SA+A |
|---|---|---|---|---|---|---|
| 11 | Feedback on student's evaluation helps lecturers to improve their teaching. | 37<br>71.2% | 15<br>28.8% | 0 | 0 | 100% |
| 12 | Results of student evaluation are needed to improve classroom instruction. | 29<br>55.8% | 20<br>28.5% | 2<br>3.8% | 1<br>1.9% | 84.3% |
| 13 | Results of student evaluation can be used to improve student learning. | 32<br>61.5% | 20<br>38.5% | 0 | 0 | 100% |
| 14 | Results of student evaluation can be used to assess needs of lecturers. | 27<br>51.9% | 17<br>32.7% | 7<br>13.5% | 1<br>1.95 | 84.6% |
| 15 | Student evaluation report can help lecturers to evaluate themselves. | 33<br>63.5% | 19<br>36.5% | 0 | 0 | 100% |

**Summative functions of student evaluation of the lecturers teaching**

Data from items 16-20 on the questionnaire were used to capture the perception of respondents on the summative functions of student evaluations of lecturers' teaching; responses are summarized by Table 5.

**Table 5: Summative functions of the student evaluation of the lecturers teaching**

| No. | Item | SA | A | D | SD |
|---|---|---|---|---|---|
| 16 | Results of student evaluation are needed for administrative decisions. | 15 (28.8%) | 30 (57.7%) | 3 (5.8%) | 4 (7.7%) |
| 17 | Student evaluation results should be used for promotion of lecturers. | 9 (17.3%) | 25 (48.1%) | 14 (26.9%) | 4 (7.7%) |
| 18 | Student evaluation results are needed for salary increase for lecturers. | 4 (7.7%) | 17 (32.7%) | 26 (50%) | 5 (9.6%) |
| 19 | Student evaluation results are needed to select the best lecturers for award in the faculty. | 24 (46.2%) | 9 (17.3%) | 12 (23.1%) | 7 (13.5%) |
| 20 | There is a need for student evaluation of lecturers yearly. | 25 (48.1%) | 24 (46.2%) | 1 (1.9%) | 2 (3.8%) |

As shown in Table 5, the respondents had a mixed perception to the use of student evaluation results for summative purposes. They were highly positive (86.5%) on the first item, which sought to ascertain whether results of student evaluation should be used for administrative decision, with 28.8% and 57.7% Strongly Agreeing and Agreeing, respectively, and only 13.5% who felt it was unacceptable. However, the strength of their perception declined on the subsequent items that focused on particular administrative decisions. A fairly positive perception (65.4%) was revealed on whether student evaluation results should be used for promotion of lecturers. This comprised 17.3% and 48.1% of the respondents who Strongly Agreed and Agreed with the statement. Fewer respondents (40.4%) supported the view that student evaluation results should be used for salary increase for lecturers: 69.6% of the respondents rejected the idea. On whether student evaluation results should be used to select the best lecturer for award in the

faculty, 46.2% Strongly Agreed and 17.3% Agreed, culminating in 63.5% of the respondents that were positive. The idea was rejected by 36.5% of the respondents. Nevertheless, the majority of respondents (94.3%) were of the view that student evaluation of lectures' teaching ought to be a yearly exercise

### Influence of purpose of evaluation on lecturers' perceptions of student evaluations of teaching

The study computed the dependent t-test to determine the extent to which purpose of evaluation influenced the perception of lecturers to student evaluation of their teaching. The analysis tested whether the mean score for the perception of lecturers to student evaluation when the purpose was formative was not significantly different from the mean score of the same lecturers when the purpose was summative. The results are presented in Table 6.

**Table 6: Paired Sample t-test of Perception of Lecturers to Student Evaluation under Formative and Summative Purposes**

| Purpose of evaluation | Mean | SD | SE | Df | t-value | p-value |
|---|---|---|---|---|---|---|
| Formative | 88.94 | 11.896 | 1.650 | 51 | 6.901 | .000 |
| Summative | 72.79 | 17.247 | 2.392 | | | |

*Significant at.05 level, (Critical t-value = 1.68) n = 52, df = 51.

The results in Table 6, show that the calculated t-value, 6.901, was greater than the critical t-value, 1.68, for the two-tailed test, denoting that the two mean scores were different. This means that lecturers' perceptions of student evaluations of their teaching effectiveness was more positive when the purpose was formative ($M$ =88.94, $SE$ = 1.650) than when the purpose was summative ($M$ = 72.79, $SE$ = 2.392), $t$ (51) = 6.901, $p < .05$, $r = .69$.

## DISCUSSION

The findings of this study show that lecturers at the University of Malawi, KCN have a generally positive perception towards student evaluations of their teaching effectiveness. This is different from findings of some studies (Iyam & Aduwa-Oglebaen, 2005; Machingambi & Wadesango, 2011; Yusuf et al., 2010) but supports the findings of Idaka et al. (2006), Inko-Tariah (2013) and Adeyemo's (2015), who found that lecturers in Nigeria had a very positive disposition to student evaluation of their teaching effectiveness. This finding has important implications because it suggests that the University of Malawi quality assurance initiative to implementing the student evaluation of the lecturers teaching will experience little resistance among lecturers at KCN.

However, it is not clear whether this could predict the lecturers' utilization of students' evaluation feedback. As Beran and Rokosh (2009) caution, lecturers' positive perception towards student evaluations does not often correlate with the actual usage of student evaluation results for improving teaching. Concomitant with Adeyemo's (2015) study of the Nigerian situation and Atek et al.'s (2015) study set in Malaysia, this study found no significant difference in the perception of lecturers towards student evaluation of their teaching based on gender. That is, there was uniformity between male and female lecturers because they both perceived student evaluation of the lecturers' teaching positively. This is promising since the majority of lecturers at KCN are female (73.1%). Studies conducted in other countries found that gender influenced lecturers' perceptions,

with female lecturers being more sensitive to student evaluations than their male counterparts (Inko-Tariah, 2013; Gichinga et al., 2014). In addition, although it is generally argued that junior and less experienced lecturers are likely to have a more negative attitude to student evaluation of the lecturers teaching effectiveness than senior academics/professors because of their educational and professional inadequacies (Iyam & Aduwa-Oglebaen, 2005; Machingambi & Wadesango, 2011), the findings of this study did not show any significant difference in the perception of lecturers because of age, academic qualification, professional rank, and teaching experience. This also contradicts findings of studies which demonstrated that the attitude of lecturers towards student evaluation of their teaching significantly differed in terms of age and teaching experience (Inko-Tariah, 2013), academic qualification, and professional rank (Idaka et al, 2006).

The study further revealed that lecturers at KCN were somewhat dissatisfied with the use of student evaluations of their teaching for summative purposes but were significantly positive that such results should be used for formative purpose. This conformed to findings of studies conducted in other countries (Adeyemo, 2015; Atek et al., 2015; Gichinga et al., 2014; Idaka et al., 2006), suggesting that it would be naïve to think that lecturers are ignorant of the value of student evaluations of their teaching. Rather, the critical and unresolved issue revolves around the purpose for which the student evaluation of the lecturers' teaching should serve. By approving student evaluation of the lecturers' teaching for formative functions, KCN lecturers invariably recognized the unique contribution that students as stakeholders in the education system could make towards fostering professional growth of lecturers and improving classroom instruction and student learning (Iyam & Aduwa-Oglebaen, 2005).

It is not clear what led to discomfort with the use of student evaluations for summative purposes, particularly promotion and salary increment. Generally, one would think that, if lecturers know that their advancement depended in part on student evaluations, the chances are high that they would seriously consider rendering effective teaching. Idaka et al. (2006) provides one explanation; that is, that lecturers are simply more sensitive to the harm such practices could inflict on their career because of their tendency towards self-preservation. More cogent, though, is the argument that centres on the validity and reliability of student evaluations. Some critics argue that lecturers tend to question the practice of deciding issues of promotion, dismissal, salary, and tenure on the basis of anonymous students who complete a few items at the end of the semester which may not accurately measure the complexity and multidimensionality of effective teaching (Machingambi & Wadesango, 2011). This argument cannot just be dispelled, as there is currently no consensus on what constitutes effective teaching in higher education. As such, institutions need to seriously consider using a variety of evaluation methods to control for the potential bias in the student evaluation process in order to effectively assess the lecturers' teaching.

## CONCLUSION

From the results of the study, it can be concluded that implementing student evaluations of lecturers' teaching effectiveness in the monitoring of quality teaching at the University of Malawi, KCN, is likely to face little resistance. Just as with their counterparts in countries where student evaluations of lecturers teaching has taken root, the majority of lecturers in this study, regardless of gender, age, academic qualification, professional rank, and teaching experience, highly supported the initiative, although they were of the

view that if the results of the student evaluation of the lecturers teaching are used for formative and summative purposes, they should not be linked to promotion and salary increase. Therefore, it is important that the University of Malawi should tread carefully in implementing student evaluations of lecturers' teaching effectiveness if it is to serve both formative and summative purposes. Particularly, where results are to be used for summative purposes, mechanisms should be put in place to ensure that students understand the value of evaluating the lecturers' teaching on the quality of education; and that lecturers do not water down the course's task demands, difficulty level, and grading propensity to please students in order to get higher scores on student evaluations instead of concentrating on providing valuable learning experiences. The study recommends that student evaluations of lecturers' teaching should be triangulated with other evaluation approaches when making administrative decisions such as promotion, demotion, dismissal, salary increase, and awards.

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# A situated political economy of knowledge: Critical social sciences in Tanzania and Ecuador

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*This article focuses on the policies by which social sciences that analyse unequal international relations are both shaped and diminished in the provincial universities of two developing countries. We examine key moments in the development and limitation of critical social sciences in Tanzania and Ecuador. In both these places, important perspectives on international political and economic structures emerged that attended to their situated socio-cultural and epistemological dimensions. In the context of Tanzania's strong state-university relations, state policies of higher education limited critical political economic approaches through their market submission. Within Ecuador's historically antagonistic state-university relations, such limitations are enacted through homogenizing regulations. Based on archival research and interviews at each site, our comparison of the domestication of critical knowledge production in these two provincial universities in the global south allows us to understand how national policies limit possibilities for the social sciences to scrutinize the political economies that shape them.*

*Keywords: social science research, higher education, development, global south*

## INTRODUCTION

This study examines the political and economic factors that permitted, then limited, the generation of endogenous critical knowledge in peripheral sites of Africa and Latin America. While studies of neoliberalism and education have emphasized global market impacts on national university and research systems, we argue, in this article, that capital accumulation processes do not homogeneously shape scientific research in dependent countries. We employ a situated political economy of knowledge to show, instead, that social science analyses produced in the global south are configured by contingent political and economic relations at multiple scales. Research epistemologies are shaped in interactions among local, national, regional and international actors, and organizations.

We focus on the political economy of social sciences in the global south, because these include disciplines that reflexively examine the peripheral conditions of their own production; that is, the epistemological consequences of their unequal position in capital accumulation processes.

In Tanzania and Ecuador, critical perspectives on enduring post-colonial structures emerged at key moments in the development of their social sciences. Incisive analyses by both Tanzanian and Ecuadorian intellectuals attended to the situated socio-cultural and epistemological dimensions of unequal economic relations. Tanzanian universities were key sites for the "Africanization" of critical social sciences in the 1970s, while Ecuadorian universities highlighted, from an Andean perspective, the cultural and epistemological dimensions of unequal social relations in the 1990s. Academic studies were intellectually ground-breaking in this sense, and intensely political. They were also, importantly, constructed through significant regional exchanges. In each case, however, such critiques also experienced moments of domestication that depended not only on changing international contexts of national development projects but also on the dynamics of local and regional state university and class relations.

In order to develop this analysis, we first review three approaches to knowledge and unequal economies. Theories of the knowledge economy, cognitive capitalism and decolonial geopolitics each provide important elements for understanding unequal international relations of knowledge production. Yet, as we shall see below, each of these approaches is limited in helping us understand the conditions in which social sciences scrutinize the geopolitics that shape them. We suggest that a situated political economy of knowledge can better help us comprehend the role of local, national and regional histories in transforming analyses of international relations. The theoretical review ends with a description of our comparative methods and a justification of the compared case studies. The two sections that follow apply this situated political economy of knowledge to case studies in Tanzania and Ecuador and show the importance of local and regional dynamics in making critical social sciences possible.

## TOWARDS A SITUATED POLITICAL ECONOMY OF KNOWLEDGE PRODUCTION

Recent studies of the relationships between global economies and national educational systems have largely focused on neoliberalism's spread of dominant practices that support and strengthen free market principles (Abendroth & Porfilio, 2015; Torres & Schugurensky, 2002). Analysts have pointed to the decrease in funding of public education, particularly at a time of expanded access (Giroux, 2014), and the marketing, managerial and audit cultures which have become institutionalized in educational systems (Bagley & Beach, 2015; Kenny 2017). Yet we also know that neoliberalism is "variegated" (Brenner, Peck, & Theodore, 2010) and that its processes, particularly in education, are "messy, uneven, and contested" (Lave, 2012). Especially in developing nations, education serves contradictory roles, "support[ing] capital accumulation, reproduce[ing] citizens and workers, and legitimate[ing] existing social and economic structures" (Thiem, 2009, p. 166).

In this context, our study looks at political and economic conditions that shape local resolutions to the tensions between universities' proclivity to reproduce unequal relations

and their critical and liberating impulses (Caffentzis & Federici, 2009). In this section, we examine the insights and limits of three approaches to understanding how economic structures and research analyses are mutually shaped: knowledge economy perspectives, theories of cognitive capitalism and decolonial analyses of the geopolitics of knowledge. We end the section describing characteristics of a situated political economy of knowledge that can help us better comprehend the relationship between critical social sciences and the conditions of their production.

Around the turn of the century, international organizations such as the Organisation for Economic Co-operation and Development (OECD) and the World Bank emphasized that "the production, diffusion and use of technology and information are key to economic activity and sustainable growth" (OECD, 1999 in Molla, 2018, p. 35). This represented a significant shift from the World Bank's previous programmatic focus on expanding primary education in developing countries (St George, 2006) and a global shift in national policies to develop research and higher education links with industry and business (Romanowski, 2017). The triple helix model represented this new approach, in which university, industry, and government capitalize on knowledge to dynamically grow and advance together (Abrahams & Fitzgerald, 2015). This and other perspectives promoting knowledge-based economies clearly instrumentalize research (Connell, Pearse, Collyer, Maia, & Morrell, 2018), "treat[ing] knowledge as a target of appropriation, an undercapitalized realm that can restart the process of capital accumulation" (Tyfield cited in Lave, 2012, p.24).

Thus, while knowledge economy approaches have made important contributions to our analysis of the role of higher education in contemporary economic structures, they have little to say about the importance of education in critiquing those structures. Shrivastava and Shrivastava (2014) reproach the knowledge-based economies perspective:

> In the context of an era of knowledge-based economies and societies, universities have to have a more complex and wider social character, which is compromised by the short-term priorities of dominant industry. Most importantly, as the institutional location of a large number of intellectuals, and as part of their knowledge dissemination function, universities need to serve as catalysts of public intellectual debate and engage vocally and critically with vital questions related to the nature and trajectory of the contemporary political economy, domestically and internationally. (p. 810)

A second theoretical approach to economy and science is the Marxist critique of cognitive capitalism (Fumagalli, 2010; Moulier-Boutang, & Emery, 2011; Vercellone, 2013), in which the transformation of the contemporary conditions of capital accumulation has made "immaterial work" (Pasquinelli, 2015) as important, if not more so, than material and productive work. While similar to knowledge economy analysts in their evaluation of the importance of education and research in today's economy, theorists of cognitive capitalism emphasize the exploitation inherent in the valorization of knowledge. Skordoulis (2016) writes that the "exploitation of invention power" represents a shift from "the 'traditional' exploitation of labour power of industrial capitalism" (p. 292). Just as industrial capitalism carried the source of its own instability in the production of a proletarian class, say these theorists, so does cognitive capitalism show the contradictions of capital in the possibilities of socially produced knowledge to redirect its productivity to the common (rather than private) wealth (Hardt & Negri, 2009). The hopefulness of this political economic approach, however, elides the historically and culturally constituted inequalities, limits, and possibilities specific to particular places, populations

and world views (Federici, 2012). In other words, this structuralist approach makes it difficult to understand the situated development of diverse critiques found in non-Western epistemologies and ontologies.

In contrast to a structural perspective, decolonial studies take seriously alternative positionalities and world views. Studies that analyse the geopolitics of knowledge (Dussel, 1993; Santos, 2014) take into account how development came to the global south through two parallel processes: modern science wedded to evolutionary theories of progress, and modern colonialism in search of legitimacy with a new, civilizing mission (Nandy, 2011). The effect of such a "civilizing process" legitimates forms of science that marginalize other forms of knowledge production (Wallerstein, 1996). One of the most important contributions of these geopolitical and decolonial perspectives is its linking of histories of colonialism and domination to hierarchies in forms of knowing (Quijano, 2000), emphasizing the analysis of regional roles in the global geopolitics of dependent economies (Walsh, 2007). Such vindications of alternative epistemologies (e.g., Santos, 2007), however, would benefit from a situated and institutional political economic perspective that more clearly links forms of knowing to capitalist modes of production (Azeri, 2016), showing the historical development of global power relations through non-market social and cultural institutions.

Rosemary Coombe (2016) argues, in her analysis of neoliberalism and science, that in order to consider the establishment of neoliberalism in specific settings, we must pay attention to existing cultural and institutional systems. In this sense, Moore, Kleinman, Hess, & Frickel (2011) note the importance of studying "what the changing relationship between industry and scientific research means and how scientific research has changed as a result" (p. 510). They note that "[a]lthough neoliberal globalization has entailed the reformulation of policies and markets that favor new political economic arrangements dominated by global capital, we believe such analyses must recognize the relative autonomy of the scientific field" (p. 527). From a theoretical perspective situated in the global south (Comaroff & Comaroff, 2012; Go, 2016), we would add the need to take into account educational development in peripheral societies within the historical conditions of capitalist expansion.

Such a situated political economy of knowledge would look at the ways that specific forms of knowledge are legitimized and valued (Dzvimbo & Moilo, 2013; Samuels, 2017). Glenna Shortall, & Brandl (2014), in a study of this type, show how funding regimes increase research on private goods, decreasing what we know and how we act regarding public goods. In this sense, "Research makes the world intelligible in specific ways and contributes to the foreclosure of other patterns of intelligibility" (Morley, 2016, p. 40) Also, in this line, Bagley and Beach (2015) study the forms of knowledge that are legitimated in teacher education in neoliberal England:

> Under new managerial regimes the forms of knowledge which are emphasised and valued focus on the instrumental and performative. As a consequence, critical and vertical forms of knowledge associated with social justice in teacher education are either absent or marginalised and reframed away from an appreciation and awareness of the structural and economic causes of inequality. (p.424)

Our study explores the utility of a situated political economy of knowledge in explaining social science production in peripheral countries in the post-colonial regions of Africa and Latin America. Because we seek to understand the impacts of dominant economic

processes in sites that are particularly vulnerable to them, we examine provincial universities in Tanzania and Ecuador.

The choice of these sites responds to a critical case purposive sampling design, as the two sites are similar in their development of critical social sciences focusing on the historical, cultural, and epistemological dimensions of structural inequalities. African-based socialism and Indigenous Andean conceptions of development were elaborated in articulation with Tanzanian and Ecuadorian intellectuals and universities, respectively. Similarities in higher education and university policies in the periods examined included the importance of extending teaching to popular sectors, gearing research towards national development, and linking university activity with social sectors in fields such as health, education, housing, and human rights. Yet, Tanzanian and Ecuadorian universities also differ greatly in terms of the historical conditions that shaped their social sciences. This is particularly evident in rural universities, where specific relationships to political actors and state institutions were fundamental to the critical potentials of the social sciences. The comparative examination of provincial universities in these two countries allows us to better specify the political and economic conditions that spurred, then limited, forms of conceiving and implementing development adapted to African and Latin American societies and cultures.

Specifically, we studied the historical and contemporary development of social sciences in Mzumbe University in Tanzania and at the State University of Bolivar in Ecuador. Mzumbe University is one of the few provincial universities in the country to offer degrees in social sciences, while the State University of Bolivar offers such degrees in an area with a significant Indigenous population. In each of these sites, we conducted over two dozen interviews with students, authorities, and university personnel. We also collected and reviewed university documents and publications to analyse each university's establishment and mission, as well as the development and justification of its social science faculties and research programs. We compared these local processes to national higher education and economic policies to show two different ways in which peripheral critical knowledge can be produced given cultural, institutional, and political conditions, and also how such social sciences can be suppressed.

In Tanzania, close ties between the national government and its universities allowed for an intellectual and political synergy that produced significant works of African thought with international influence, such as *How Europe underdeveloped Africa* (Rodney, 1972). In Ecuador, public universities were characterized by robust student movements and maintained strong ties with collective actors like trade unions and leftist parties. Endogenous critical social sciences emerged in these conditions. Yet both sites also show how critical analyses are limited in varied ways by national incorporation into globally competitive knowledge economies. In this context, historically strong state-university relations in Tanzania led to state policies that diminish critical political economic approaches through market submission of academic projects. In Ecuador, by contrast, where state-university relations were historically antagonistic, critical social sciences were curbed by homogenizing educational policies designed to make its national economy competitive. These analyses are developed in the following two sections through the application of a situated political economy of knowledge that aims to identify the conflicts and conditions that shape social science analyses.

## *UJAMAA* AND HIGHER EDUCATION IN TANZANIA

Universities created around the period of African independence relied heavily on the return of expatriate academics trained in metropolitan universities (Saint, 1992). In this sense, European frames of reference and networks remained strong in African universities, and their interactions with other sectors of society were accordingly limited: "The roles of higher education institutions in Africa after independence were not constructed out of social interaction among the society, the state and the academic oligarchy" (Tadesse & Doevenspeck, 2013, p.38). Instead, their role was defined by the new states that sought to make the emerging universities relevant to their context. In the 1960s and 1970s, several African states defined the missions of their higher education systems according to their countries' development strategies (Altbach & Peterson, 1999). It was in this context that the majority of public university institutions on the African continent were created, in the periods just before and after independence. In 1960, only six universities existed in the region; by the end of the 20th Century, there were about 100 universities, with the number of university students increasing by as much as 8.7% per year over this period (World Bank, 2009).

In Tanzania, education was central to the newly independent republic. Its first president, Julius Nyerere, was considered one of the architects of African socialism (Friedland & Rosberg, 1964), which sought to incorporate a growing public sector with a pan-African model of social development. African socialism was built around historically-rooted African community life, rather than Marxist class struggles. Nyerere was also an educator. In 1967, the government's *Arusha Declaration* outlined the state project by which all means of production were to be nationalized with the aim of achieving self-reliance through agricultural development *Ujamaa* - literally translated as "brotherhood" or "family" - also named the form of socialism espoused by the Nyerere government, which established community-owned property system and village cooperatives.

### The developmental university and the beginnings of Mzumbe University

It was in this post-independence regional context that the idea of the "developmental university" was elaborated (Coleman, 1986, p. 477). Newly established national universities—including Ahmadu Bello University in Nigeria, the University of Science and Technology in Ghana and the University of Nairobi—were to play an important role in not only development but also in the construction of national identities, diversifying the institutions, curriculums and programs to respond to the specificities of African cultures. Kwame Nkrumah, the Ghanian leader of the pan-African movement, asserted in 1956: "We must in the development of our universities bear in mind that once they have been planted in the African soil they must take root amidst African traditions and cultures" (cited by Letsekha, 2013, p. 9). Tanzania's University of Dar es Salaam led significant contributions in cultural and political terms, becoming an international seedbed for progressive Third World thought (Bgoya, 2015; Blommaert, 1997).

Tanzanian rural institutions of higher education were also expected to respond to national needs. The British Local Government School in the province of Morogoro had operated since 1953, when it was established under British administration with the purpose of educating local chiefs and their children as native authorities at the service of the colonial structure, as tax collectors and court secretaries. In 1970, at the height of support for the "developmental university," the Local Government School merged with the Public

Administration Institute of the University of Dar es Salaam to become the Institute of Development Management (IDM). Tanzania's second national development plan of 1972 gave priority to making the Institute an autonomous State institution that would provide advanced management training previously only available abroad (Habi, 1991). Thus, the IDM functioned as an extension of the University of Dar es Salaam until becoming Mzumbe University in 1989.

State-defined goals for higher education institutions outside of the capital city included the formation of a bureaucratic middle class that could help strengthen national public administration. Provincial institutions such as the IDM were specifically encouraged to prepare accountants, professors, doctors, technical experts, and engineers to hold what were considered important positions for reconstruction of the nation (Tadesse & Doevenspeck, 2013). A professor who experienced these changes in the Morogoro Institute recalls that this institution sought to produce graduates to be employed in various public service positions. University faculty also carried out commissioned research studies for the Government and para-State institutions (Interview, 6 October 2015a).

The Africanization of university education was particularly endorsed by national professors because it legitimated their training and experience with respect to expatriate professors (Cloete & Maasen, 2015). In its first decades, the IDM produced research that sought national development with attention to the particular social and cultural context of the new Republic of Tanzania. Representative publications in the IDM's journal *Uongozi* (Swahili for "leadership") through the 1980s include: "Disengagement from imperialism: an imperative for the structural transformation of Tanzanian-type economies", "Workers' participation in management", "Civil servants' value system and public policy making in Africa for the 1980s" and "Social articulation as a condition for equitable growth in poor countries." Of note in these articles are their insistence on understanding and incorporating endogenous African society and traditions into the new institutions that might steer the continent's new nations towards more just societies.

Yet as Tanzanian universities enjoyed a shared national mission with the socialist state, their sense of autonomy was not *from* the national government—as was the autonomy claimed by Latin American universities—but rather a shared autonomy *with* the government from the structures of unequal international relations. Mamdani (2008) notes the dangers of such close collusion: "The more nationalism turned into a state project, the more there were pressures on the developmentalist university to implement a state-determined agenda. The more this happened, the more critical thought was taken as subversive of the national project" (p. 6). This was a concern throughout African countries in the 1970s, where university professors and researchers were expected to be fully committed to state interests. In Tanzania, Nyerere's progressive project of "Education for Self-Reliance" led to ideological requirements for university authorities and the expelling of students protesting state-dictated policies (Berdahl, 2010). This weakened higher education's capacity for critique, further aggravated when the state turned to neoliberal responses to its economic crises of the 1980s.

## Subordinated social sciences in a neoliberal Tanzania

Through the 1970s, Tanzania showed strides in education, health care, political stability and a steep decrease in income inequalities—the ratio between highest and lowest paid civil service salaries decreased from 50:1 in 1961 to 5:1 in 1981 (Mukandala, 1988).

Nevertheless, its economy was in serious straits by the 1980s, as was the case for many African countries. The World Bank reports that Tanzania's economy contracted on average by 0.5% a year between 1965 and 1988 (Lewis, 1990). Resisting stringent structural adjustment economic reforms that would have to be imposed with International Monetary Fund aid, Nyerere was criticized by a World Bank country director in Tanzania for his "I asked for money, not advice" attitude (Helleiner, 2000). Dissension within his government grew over this stance and, in 1985, Nyerere resigned. His successor as President, Ali Hassan Mwinyi, signed an agreement with the IMF in 1986.

In this context, the developmental university model ceased to be a benchmark for public policies for education, and a new frame of reference appeared, characterized by a series of fundamentally neoliberal discourses, practices and policies tied to the market. The structural adjustment programs promoted by the World Bank and the IMF (Sawyer, 2004) transformed universities in the country, privatizing education and implementing cost-sharing programs (Aina, 2010, p. 29), and replacing academic programs with vocational technical training. These dynamics were clearly reflected in the changes that took place at the Institute for Development Management into the 1990s, which once more assumed its role of training teams and professionals to serve the government. A long-time professor and administrative authority of the university commented that the IDM had to serve the country's shift from a socialist to a liberalized economy: "We had to help solve the crises which is why we established a number of programs in the training institution" (Interview, 5 October 2015). In 1988, the IDM charter was amended, to establish further roles in the IDM's provision of courses and consultancies to meet the needs of expanding corporations, decentralization programs and administrative reforms scattered all over the country (Interview, 6 October 2015a).

The changes throughout the country were enormous. Throughout the rocky transition period from a centralist, socialist economy to a market-based economy, public sector employment declined substantially, and the informal sector gained importance (Mukyanuzi, 2003). This sector had to be addressed, particularly since this period saw the number of university graduates entering the labour market growing faster than wage employment. At the University of Dar es Salaam, professors remembered the university's response: "With para-State reforms and the privatization process, it became necessary to support the development of domestic entrepreneurs dominating the informal sector" (Alsamarai, 2003 cited in Kalimasi, 2013, p. 438). The IDM considered that "competition is the order of the day and one will survive if one delivers the goods" (Ntukamazina, 1991, p. 435). In terms of research, the "goods" to be delivered included a research agenda and issues that could find support from private and international funders, as public support for the university and its research waned.

Multilateral agencies, such as the IMF and the World Bank, foreign European governments, and international foundations including the Rockefeller, Ford, and Carnegie Foundations became increasingly central to the financial support of Tanzanian scholars' research; in this transition, topics such as "African socialism, self-reliance, and even labor relations were replaced with a focus on issues such as technology, gender issues, and highlight environmental planning" (Jamison, 2010, p. 170–171). Research on the international context and political economy likewise decreased at the IDM from the 1990s onward, to focus increasingly on specific issues and case studies. From 1982, when the IDM's journal *Uongozi* was inaugurated, through 1994, close to a third of the research

published focused on the international context of management. Through the 1990s, however, such subjects decreased to make up only a small part of the studies published in the journal (12% of the studies from 1995–2013). Case studies and research on entrepreneurial issues, increased from only 7% of the publications from 1982–1994 to make up 33% of the publications in 1995–2013. Studies that situate local and national development issues in the context of international political economy are increasingly rare in the journal.

When the IDM was transformed into Mzumbe University in 2001, Tanzania was the East African country with the lowest rate of university education, despite having one of the largest populations in the region. Under pressures to expand higher education, Mzumbe University was established as the third public university in the country and its Faculty of Social Sciences, which had been founded with an Economics Department, expanded to include an education program. The current dean of Social Sciences recounted that the establishment of the education program was "by request of the government of Tanzania" (Interview, 15 October 2015). The Education Department was established in 2005, yet a decade later, a professor in the Education Department noted its continued isolation from the rest of the university (Interview, 12 October 2015). A current professor of Development Economics, also part of the Faculty of Social Sciences, spoke of the need to include fields that reach beyond solving immediate and pragmatic problems: "For development studies, you need humanities" (Interview, 6 October 2015b). The Mzumbe University Prospectus itself shows a conception of social sciences that serve management and development, with little attention to teaching critical skills needed to analyse social and economic structures. The university's sense of functional social sciences, "geared toward the solution of problems" (Mzumbe University, 2015, p. 114) —in one of the very few provincial universities to even have a social science faculty—is reflected in the Education Department's emphasis on entrepreneurial education.

If, as we began this paper proposing, the social sciences include fields of study most apt for critiquing unequal social and economic structures, then the neoliberalization of higher education in Tanzania has marginalized these fields both in terms of content and in number. Of the undergraduate programs nationwide in the 2013–2014 academic year, social science programs make less than 3% (Tanzania Commission on Universities, 2013). Of 907 undergraduate programs, almost 300 were in Finance, Business, and Management; Services was the next highest category of undergraduate programs with 112 programs. The smallest number, by far, of programs by study area is the social sciences with only 24 programs. This lack of social science programs translates into a dearth of critical studies of social relations but is also characteristic of the university and research structure in a peripheral country such as Tanzania, in which neoliberal pressures actively curb the critique of international inequalities. As we have seen in this section, the production of knowledge that can critique the political economy that shapes it is intimately linked to the question of the audience and interlocutors of tfor whom the knowledge is produced, and the actors with whom the university is engaged. The close university-state relations in Tanzania meant that as the state increasingly hewed to pressures from the global economy so did the production of knowledge in the social sciences at Mzumbe University.

## RADICAL CRITIQUE AND ITS NEUTRALIZATION IN ECUADORIAN UNIVERSITIES

The changes in African and Tanzanian universities were part of a larger shift in higher education throughout the global south. In the last three decades of the 20th Century, university enrollment in developing countries increased more than ten-fold, going from almost seven million students in 1970 to more than 75 million in 2004 (Guruz, 2011). The number of institutions of higher education in Latin America rose from 330 in 1975 to approximately 2000 in 2003 (Fernández & Pérez, 2013). In Ecuador, rising socioeconomic expectations from the banana exportation boom in the 1950s and increasing urban migration after the land reforms of the 1960s led to the growth of urban Ecuadorian population from 28% in 1950 to 41% in 1974. University enrollment began growing annually by 10.8% in the 1950s and by the 1970s was growing annually by 27.4% (Romero, 2002).

While the African "developmental university" in the 1960s and 1970s put higher education at the service of the newly independent states, the link between universities and development in Latin America was complicated by the contentious relationship between educational and state institutions. In Africa in this period, new national bourgeoisies were emerging in the newly independent republics, reproducing social inequalities and neo-colonialism (Sow, 1994). In Latin America, however, the growing university student population of the 1960s and 1970s radicalized the democratizing role of universities and state-university antagonism. In 1970 in Ecuador, President Velasco Ibarra issued a decree to shut down the capital's public university. His 1971 Law of Higher Education was emphatically rejected by the First National Congress of Universities and Polytechnic Schools of Ecuador. Ecuadorian universities of the 1970s thus found themselves in a quandary, caught between social demands of the post-Cuban Revolution era and national developmental needs, as we shall see below.

### Technical approaches to land reform

In the hopes of staving off the spread through Latin America of redistributive ideologies ignited by the Cuban Revolution, US policies offered modernization programs of agricultural development. In Ecuador's highland province of Bolivar, one of the educators who began the process to bring higher education to the area recalls: "The country began to change after the reforms proposed by the Alliance for Progress began... So, instead of revolutions, reforms were started" (Interview, 27 July 2015). The province of Bolivar was representative, in this sense, of Ecuador's rural mountain region, and more specifically, of the region's poor areas. In the early 20th Century, the Bolivar province began to be isolated from the country's economic dynamics when it was excluded from the national railway route. This isolation was further exacerbated in the 1960s–70s, when national industrialization policies strengthened Ecuador's large cities to the detriment of provincial cities and the rural sector, and state investment in industrialization resulted in a significant reduction of wages and living conditions in the rural sector (Bocco, 1989).

In addition, development programs sought to modernize both technical rural economies and traditional socioeconomic forms of *hacienda* management. Ecuador's *Agrarian Reform Law* was passed in 1964. In this economic and political context, a group of Bolivar's elite, educators living in the city of Guayaquil, lobbied to establish an extension program of the University of Guayaquil in their provincial capital of Guaranda. They

convinced University of Guayaquil officials to offer an Engineering for the Administration of Agroindustrial Enterprises degree program in Guaranda.

The university extension began to function in the same years that national land reform was being implemented. But the University of Guayaquil's School of Administrative Sciences, rather than its School of Agronomy, directed the extension program, emphasizing an administrative and modernizing approach to rural management. As such, the program's curricular and educational approaches to agrarian issues responded to elite landowners' needs rather than popular demands for equality. Such a tendency to de-politicize agrarian reform is apparent in a study conducted for the University of Guayaquil's School of Agronomy in 1975; the study argued that a finite amount of land and a growing population meant that land distribution should be studied "scientifically" rather than politicized in terms of social inequality (Gonzáles Holmes, 1975, p. 1).

The university leader who would later oversee the extension's transition into the autonomous State University of Guaranda describes pressures on rural institutions to increase technical careers: "[These] were pushed specifically to make technological changes in the agricultural and livestock sector. The old *hacienda*, the huge old farm, was to become a modern *hacienda*, using machinery and green farming, using agrochemicals, and the like." (Interview, 27 July 2015). Despite many Guaranda academics' critiques of national development policies, the new institution was obliged to offer technical programs in line with the development model promoted by the State. In these programs, the administrative character of land reform was emphasized, instead of its socio-political questioning of land ownership.

After the 1970s petroleum boom, the Ecuadorian economy began to falter as international prices declined in the early 1980s. In 1982–83, El Niño's severe floods, rains, and droughts damaged agriculture and infrastructure, adding to the country's economic difficulties, as debt servicing rose to absorb up to 60% of the country's export earnings in 1984. Consumer prices rose 14% in 1980, increased by 25% in 1982 and by another 53% in 1983 (Flores & Merrill, 1989). Structural adjustment policies in this period reduced public investments, including in education, and the University of Guayaquil was unable to continue funding the extension program. As inauspicious as this context seemed, it provided a momentous opportunity for the leftist academics of Guaranda to establish an autonomous university.

The political ties of these academics to Socialist Party legislators helped them gain Congressional approval and state funding for the new university in 1989. Milton Cáceres, a militant colleague of the university's first president, Cáceres had been involved in the agrarian reform demands through his contact with Indigenous and peasant farmer communities in rural provinces throughout Ecuador (Quishpe, 2015). He noted that it was to Indigenous cultures that "the Ecuadorian Marxist Left, of which I've formed part, has the largest debts... It is not possible to build another country without considering their incredible contributions" (Interview, 24 October 2015). University President Gabriel Galarza thought likewise: "Especially in the Andean countries, the Indigenous people make us break with some of the orthodox Marxist schemes... That reality has to be considered for any change here in Ecuador." (Interview, 27 July 2015).

With the institutional support to explore these perspectives in theory and in praxis, Cáceres and others founded the School of Andean Culture and Education (EECA for its initials in Spanish). This new institute proposed that Indigenous knowledge was central

to the country's intellectual and political progress. The EECA project emerged from its founders' participation in the Eugenio Chusig School for political training, which educated Indigenous-peasant leaders through a pedagogical approach that recovered and legitimized Indigenous thought, traditions and organizational forms. Both the Eugenio Chusig School for political training and the university-level School of Andean Culture and Education sought to bring these Indigenous elements together with socialist militant struggles in order to challenge predominant State and economic models. Interculturality became the linchpin of both EECA's academic proposal and its political project aimed at transforming the ways that society conceived and institutionalized development.

**Indigenous political-epistemological challenges and their standardization**

The EECA proposed an epistemological break with Western modes of knowledge production. Its academic project and study plans were shaped through discussions with Indigenous leaders. EECA's institutional founders had originally hoped to establish a sociology and anthropology program geared to educating community leaders and supporting the organization of the Indigenous movement through research into non-Western forms of knowledge. Local community leaders, however, were more concerned with Indigenous communities' dearth of access to education. The Bachelor's degree in Andean Culture and Education was EECA's first academic program. Even though its aim was to train educators, it also always contained an important socio-anthropological component. The first curriculum of this program in 1992 included the following areas of study: Theory of the Andean Community; Pedagogy of the Andean Community; and Research on the Historical-Social Processes of the Andean Community.

The school also sought to break with traditional forms of university teaching. The educational model included on-site modules in Guaranda as well as projects in students' own communities, where their formal education was brought into dialogue with local concerns. Members of the faculty travelled to and stayed in those communities and developed curricula based on their experiences. The abstract and individual generation of knowledge was far less important in EECA than the collective construction of knowledge and its incorporation into community development processes.

The EECA also organized several international gatherings for academic reflection on Andean and intercultural issues; the First International Workshop on Andean Cosmovision and Western Knowledge was held in Guaranda in 1992. Attended by Indigenous leaders, researchers and academics from Ecuador and abroad, aimed to define epistemic alternatives to the scientific paradigm of the West. Through transforming the nature of the university, the EECA sought to impact society's understanding of development. EECA founders maintain that the school's work was influential in Ecuador's later project of a pluri-national state, a form of government that aimed to include Indigenous nationalities' autonomous political and development principles, enshrined in the country's 2008 constitution.

How did such an autochthonous and alternative intellectual project prosper at an institution begun as a rural administrative extension program? In the 1990s, Ecuadorian higher education experienced chaotic growth. In the same period that Mzumbe University academics were subjected to national development policies defined by international pressures, the Ecuadorian university system was neglected by a state that had never controlled it. Private universities with clear commercial aims sprang up throughout

Ecuador, with the country's first for-profit universities established in 1993. Unregulated, the number of private universities grew to 32 by 2006. Decreased state investment left public universities with little funding, yet also gave these universities unprecedented autonomy from state pressures. In this context, experiments like the School of Andean Culture and Education (could) appeared, animated by political, popular and subaltern interests.

Such independent spaces would not last long. A process to systematize higher education was taking place at the international level, in which certification by quality assessment agencies would grant stability and legitimacy to local university systems. The Bologna Process of 1999 standardized and homogenized European higher education. The same program was brought to the Latin American region in 2003, through the Tuning Project for Latin America. In 2005, the Tuning Project in Ecuador was established. According to Aboites (2010), these projects sought to apply a European model of cognitive skills, including commercial skills with mercantile aims, in the region, with little acknowledgment or adaptation to the local context.

These global university models were precisely what Ecuadorian state authorities needed to respond to the mounting criticisms of the nation's unruly higher education system. The 2000 and 2010 Laws of Higher Education initiated and consolidated national oversight (over the higher education system; university evaluation and accreditation became a central part of state regulation of these institutions. In this context, State University of Bolivar administrators realized that an experiment like EECA—with little infrastructure, professors without doctorates, etc.—would bring down their position in the new university ranking system. Rather than risk decreased funding, or even the closure threatened for the lowest-ranked institutions, the State University of Bolivar ended support for the EECA project.

Social sciences at the State University of Bolivar are now housed at the School of Jurisprudence and Political Science, which offers degrees in law and sociology. The sociology degree was established in 2010, to train planners and civil servants. In contrast to sociology's radical and Marxist tendencies throughout Latin America, sociology at the State University of Bolivar is aimed at teaching technical skills for public policy design. The Vice Dean of the School stressed the importance of avoiding political conflict and promoting liberal inclusion: "We cannot take up the banner for a struggle, because otherwise [the state] will fault us or think that we favour one political sector over another" (Interview, 16 June 2015). That the critical edge of EECA's intellectual and political project has been dulled is apparent in the multicultural approach to Indigenous issues now incorporated into the new sociology program. Social sciences at the State University of Bolivar have been standardized, steering away from critiquing social contradictions and inequalities, to provide technical and functional responses to development problems.

## HOPES AND CHALLENGES FOR THE PERIPHERAL PRODUCTION OF CRITICAL KNOWLEDGE

Given their situated and peripheral positions, intellectuals of the global south develop analyses very different from those that produced in other places. The relationship between economic and educational structures in the post-colonial period is not only influenced by international political economy, but also by local and national class relations and the historically constituted relations among universities, societies and their governments. In

their diverse contexts, universities seek to make their teaching and research relevant to the solution of collective and national problems. Yet the analytic definitions of what constitute problems, collectives, solutions and even relevance are deeply embedded in both historical and socio-political contexts.

Tanzanian universities sharpened their oppositional analyses to unequal world systems in a joint mission with the post-independence socialist state, contributing to the development of African forms of socialism. In Latin America and Ecuador, universities' democratizing bents were part of their historically antagonistic relationship to elite-controlled national governments. Further, Ecuadorian rural universities were isolated from the country's development priorities, which, paradoxically, gave these provincial sites some margin of liberty to elaborate radical epistemological and political responses to their exclusion. The framework of a situated political economy of knowledge helps us recognize the fundamental role of multi-scalar networks of academic and political exchanges in the constitution of regional epistemologies and social sciences that reflexively examine the conditions of their production.

The possibilities for such critical analyses, however, are limited when national policies seek to compete on both the epistemological and economic terms dictated by dominant capitalist processes. Tanzanian universities' historically close ties to State projects meant that university priorities shifted along with national aims. When Tanzanian national development policies took on neoliberal characteristics in the 1990s, so did their universities; dependence on international agencies became a shared characteristic of both the government and the universities. International organizations and development projects focused university research and teaching on managerial and entrepreneurial approaches, leaving little room for regional African exchanges and leading to the marginalization of the social sciences in universities. Rural universities, in particular, continued to serve the technical and administrative needs of government bodies.

In the same period that an entrepreneurial spirit began to dominate Mzumbe University's Faculty of Social Sciences, the State University of Bolivar's School for Andean Culture and Education was generating Indigenous-based challenges to dominant knowledge production. Both of these developments were responses to the changing role of knowledge in the accumulation of capital; their differences were due to historically configured political, class and institutional relations at the local, national and regional levels. Given the longstanding State-university antagonism in Ecuador, the Ecuadorian government sought to incorporate the country into the international knowledge economy through top-down higher education reforms. Such standardizing policies preclude the possibilities of experimental projects like EECA. Regional academic exchange continues, but the professionalization of Latin American academics according to international standards has generally become more important than stimulating endogenous perspectives and situated critiques.

Rigorous research and analyses from peripheral standpoints are particularly necessary for understanding the social and epistemological dimensions of unequal political economic structures. Yet, the possibilities for their continued innovation and force will depend on both national and international higher education policies that attend to the conditions in which such locally-based critiques may emerge. Inequalities persist as long as mechanisms that discipline their criticism exist. One small step in our persistent struggle

against these inequalities is a better understanding of how politics and economics function to compromise critical knowledge in situated circumstances.

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# Teaching controversial issues in Japan: An exploration of contextual gatekeeping

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*This qualitative case study sought to understand the extent to which Japanese high school social studies teachers grapple with controversial issues in their classrooms. Situated within a curricular-instructional gatekeeping framework, we conducted semi-structured interviews with eight respondents of varying backgrounds and schools in Okayama, Japan. The findings indicated that although the respondents believe they can teach controversial issues in their classrooms they generally do not because of specific contextual forces. Although we found controversial issues instruction to be generally moribund, one respondent provided a rationale that reconceptualized exam preparation curriculum and instruction.*

*Keywords: controversial issues; curricular-instructional gatekeeping; Japan; social studies education*

## INTRODUCTION

Controversial issues education is integral to democratic citizenship education (Camicia, 2008; Engle & Ochoa, 1988; Hahn, 1991; Harwood & Hahn, 1990; Hess, 2008, 2009; Hunt & Metcalf, 1968; Misco & De Groof, 2014; Ochoa-Becker, 2007; Oliver & Shaver, 1966; Parker, 2012). Controversies constitute a normative anchor within citizenship education curriculum, and the degree to which controversial issues are subjected to reflection has profound implications for the vibrancy of a democracy. Addressing controversial issues can help shift student focus from authoritative narratives and perspectives to heterogeneous micronarratives that draw on and challenge local and individual forms of knowledge (Levinson, 2008). Controversial issues widen and enlarge students' experiences through grappling with the normativity of topics and the multiple perspectives entertained among their teachers and peers as they work to establish understandings and formulate solutions without succumbing to the tyranny of forced meaning (Giroux, 1983) and the often-seductive appeal of prevailing belief and opinion.

Discussing controversial issues can overlap with ideological battles outside or within the school but it supersedes those battles given that the essential mandate of schools is to encourage students to deliberate on issues from multiple sources and perspectives (Misco, 2011; Hess, 2004; Marcus & Stoddard, 2009).

Context is a critical lever for how an issue is filtered, rendered, or avoided because what are considered controversial changes over time and personal narratives are interpreted and mediated with local knowledge to create new knowledge (Levinson, 2008). Controversial issues are *controversial* because they ultimately speak to normative value judgements, which individuals frame within their ethical principles (Oulton, Dillon, & Grace, 2004), and historical, social, political, and ethnic contexts. Often, it is the not the issue itself that prompts the type or degree of treatment in a classroom, but the dynamics as shaped through the attitudes and experiences of participants (McCully, 2006). Typically, it is not the teaching of controversy that raises concerns but the moral, social, and political substructure and the ways that schools handle these issues that provokes resistance and brings about teacher protection-oriented postures (Bridges, 1986; Byford, Lennon, & Russell, 2009).

School environmental factors, pointing to context and milieu, are significant variables where the "wider cultural milieu also mediates the effects of classroom climate" (Hahn & Tocci, 1990, p. 358) as are an intractable web of "social, cultural, and historical relations in which students themselves are situated" (King, 2009, p. 240). In some communities, issues simply become more controversial if they are perceived as "inappropriate for the curriculum or because there is pressure to deal with only one perspective on an issue" (Hess, 2002, p. 14).

The extent to which controversial issues enjoy treatment in classrooms has profound implications for the kind of citizen Japan seeks to prepare. Westheimer and Kahne's (2004) continuum of three orientations of citizen is instructive here. The Personally Responsible citizen "acts responsibly in his/her community" (p. 241) and focuses on values such as honesty, integrity, and volunteerism. Such citizens work at the local food drive, donate blood, and vote. The Participatory citizen builds upon the qualities of the Personally Responsible citizen by actively participating in the "civic affairs and the social life of the community at local, state, and national levels" (p. 241). Such citizens not only volunteer at the local food drive, they organize one. They not only vote but may also run for office. The justice-oriented citizen has all the characteristics of the other two but adds informed criticism and problem solving such that they are focused on "responding to social problems and to structural critique" (p. 242). These citizens might not only volunteer for and organize the food drive but also question policies that create class differences and poverty (Patterson, Doppen, & Misco, 2012).

After World War II, social studies in Japan started as a core subject in the citizenship education curriculum (Ikeno, et al., 2011) with the purpose of the subject widely believed to develop children's citizenship capacities. Citizenship education in Japan, as in other democratic countries, is concerned with the development of responsible citizens who will contribute to their respective communities. There are various beliefs about citizenship in Japan, including the perspective that citizenship comprises pluralistic aims (Moriwake, 2001) and is the unity of knowledge, skills, and attitudes that are not able to be divided (Ikeno, 2009). Today, the latter belief is the more popular one and teachers and scholars have come to support the opinion that social studies should not only raise the knowledge

base of students, but also broaden their skills and attitudes. Therefore, discussion of controversial issues is being introduced in schools at both the elementary and high school levels. However, controversial issues are raised as problems without an absolute rule of "how I should decide to act?", leaving this question up to each person's judgement. In reality few teachers raise discussion of controversial issues in their classes, and those who do are generally engaged in researching controversial issues education. The question is why is it apparently difficult for most teachers to discuss controversial issues (Kuwabara, 2000)?

The school curriculum in Japan is determined by the government and detailed in textbooks. Therefore, teachers' discretion in what they can teach is limited. The attitude of both students and their parents centres on the importance of entrance examinations rather than sources of knowledge and thus they tend to support common lessons in line with what is contained in the textbook. Although it is difficult for teachers to deal with controversial issues in social studies classes in Japan, the danger of doing so is not as high as it might be in other Asian countries. That is, in Japan, teachers can teach controversial issues if they teach in line with the content in textbooks and there is no pressure on teachers to do otherwise.

There are few substantial studies on the topic of teaching controversial subjects in Japan and many teachers and students regard social studies as learning by rote. Nevertheless, able and earnest teachers are willing to try various new teaching methods in order to improve social studies teaching and learning (Murai, 2014) as evidenced by an increasing number of qualitative studies of such teachers (Iwasaki, 2016; Okajima, 2018). Increasing studies, however, do not mean that the number of such teachers are also increasing.

Given the problems surrounding the teaching of controversial issues in Japan, the research questions framing this study are:

1. To what extent do social studies education teachers in Japan find value in broaching controversial issues? If they do, what is their rationale for doing so?
2. To what extent do teachers use, manipulate, or subvert the official curriculum in order to teach controversial issues? What pathways and challenges do they encounter when doing so?

Because these research questions ultimately focus upon teachers and the decisions they make about treatment of controversial issues, we decided to employ the theoretical lens of curricular-instructional gatekeeping as located within a particular context.

## METHODOLOGY

As a preliminary examination of controversial issues instruction in Japanese social studies classes, this study employed qualitative methods, primarily because such research methods are well-suited for addressing research problems concerning norms, structures, conditions, and processes (Glaser & Strauss, 1967). The research questions also contain normative elements and assume a constructivist ontology, which undergirds qualitative methods and asserts that there is not one reality but rather multiple interpretations and renderings of the world (Merriam, 2001). The primary source of data for this study was teacher interview responses.

We conducted semi-structured interviews with eight high school social studies teachers. All respondents teach within Okayama, Japan. We selected Okayama as a site of our study because two of the authors teach at universities in Okayama and because the authors have professional relationships with classroom teachers. As a form of member checking, we often repeated answers to respondents to approach a sense of verisimilitude of responses. One shortcoming of this study was the lack of long-term rapport building with respondents; as a result, some respondents may have been reluctant to explicate a full range of responses to the questions. We employed a purposive sampling technique because we sought out typical cases through a snowball method, which also involved key informants (Patton, 1990). Purposeful sampling lacks a rigid formula and instead relies upon criteria, such as accessibility, representability, and interest (Toma, 2006). We chose to conduct qualitative case studies given the dynamic nature of the research problem, the interpretivist research questions, and the bounded cultural context of Japan that houses controversial issues (Miles & Huberman, 1994; LeCompte & Schensul, 1999). A case study approach, when thickly described, is well-suited for understanding educational problems, processes, and discovery rather than confirmation, as they typically "reveal something about a phenomenon, knowledge we would not otherwise have access to" (Merriam, 2001, p. 33).

### Data analysis

Rather than apply analytical tools *a priori*, analysis involved data induction to form theoretical categories and tentative relationships (Lincoln & Guba, 1985). Employing an inductive-generative-constructive approach, we sought to understand relationships of data (i.e. generate hypotheses) through initial observation, refinement, and comparison to emergent category coding, whereby collection and processing of data was simultaneous (Goetz & LeCompte, 1981; Lincoln & Guba, 1985). Tentative typologies informed data reduction and organization by recurring themes that fit within the established research questions, while attempting to retain conceptuality and not dilute thick description into thin description (Steiner-Khamsi, Torney-Purta, & Schwille, 2002). By employing a cross-case synthesis approach (Yin, 2009) we were able to construct cross-case patterns which strengthen the credibility of findings. We adhered to Yin's (2009) caveats for case study analysis because we attended to all evidence, addressed all major rival interpretations, explored most significant aspects of cases, and employed our own prior knowledge of this topic and context. Although findings in this context are not necessarily applicable to another context, they have the potential to generate hypotheses for other current or future contexts and can inform policy and practice implications not only for the context under study but for similar contexts as well (Hahn & Alviar-Martin, 2008; Schofield, 1990).

## FINDINGS

### Goals of social studies

Teachers noted common goals of social studies in Japanese classrooms. At 28, Kasumi has taught high school for five years in a rural community outside of Okayama. She teaches Japanese history and contemporary society and holds a Bachelor of Arts (B.A.) in history and an M.Ed. in social studies education. Contemporary society provides an introduction to politics, ethics, and economics. Kasumi suggested that social studies

should be taught for "knowledge and skills for the society to go into the society" and that the goal of social studies education is "encouraging students to obtain knowledge and skills as a member of society" and should develop a love for learning. Her expressed rationale for students learning controversial issues was described as a "desire for students to understand different opinions and perspectives."

Takashi is a 54-year-old high school teacher with 29 years of teaching experience. He currently teaches contemporary society and local culture and history. He believes that social studies education should "… teach more citizenship qualities so that students understand the systems of the country and the relationship of nation and local communities." Ultimately, he hopes to prepare students "to take action" in harmony with others since "we cannot live alone, we can live with other member of the community."

The other participants also indicated goals related to developing students' perspectives and abilities to make change and be socially active and engaged. At 30 years old, Juro has six years teacher experience and currently instructs in courses on world history, politics, and economics. Juro asserted that social studies is "the study of us and the something around us, which includes humans—social studies is about humans." He felt the primary purpose within this aim is the improvement of student judgement, in particular about historical views, neighbouring countries and, after graduation, students "could make a judgement about their own historical perspectives; this could improve skills about judgement."

At 34, Shirou has been teaching for 11 years. He holds an M.A. in social studies education and a B.A. in law. Shirou suggested there are various purposes for social studies education, but his primary expectation is that students use the content knowledge of the social studies affiliated disciplines after high school. He stated his goal as "students knowing about the past things, some of which could be related to our lives, such as current issues, that they could take action to change the world or not change the world."

At 25, Tomo has less than two years teaching experience. She holds B.A. and M.A. degrees in education and teaches high school world history, politics, and economics. She suggested that the goal of social studies education "varies in different schools" whereby "students should understand their own lives and their roots. They should understand something surrounding them and the main goal is that they should explain what they learned to others in the classroom—those who do not understand some topics and events." Tomo indicated that social studies teachers should teach some controversial topics because the purpose of social studies is related to society, whereby students should understand society as well as social issues.

At 28, Taki has six years of teaching experience and currently teaches world history and geography in the City of Okayama. Taki views the primary goal of social studies education as the development of "judgement using their knowledge that they learned in high school." Judgements, from Taki's perspective, need to be made about the proposed change to Article 9 of the Constitution, understanding the media critically, and any topic they face. Taki suggested that "the role of social studies is to teach thinking, but most of the time I teach the content—about three or four times per year I give an opportunity for students to develop their thinking."

Ichikawa teaches at one of Okayama's best high schools. At 29, he has eight years teaching experience, most recently in Japanese history and contemporary society. Ichikawa believes that social studies is the "connection between students and society where the goal is citizenship." Students who will graduate from high school should also "know the rules to survive and live—if they don't know the rules, they can't do anything." In addition to learning about different viewpoints, perspectives, and understandings, students should "learn the social system that controls over different opinions and regarding citizenship, the student should learn how to make judgements." Ichikawa expects students to make judgements based on evidence and data.

At 35, Miyagi has ten years teaching experience at Okayama's top high school. He holds B.A. and M.A. degrees in Law, as well as social studies education certification obtained during his M.A. As a current teacher of contemporary society, he felt social studies education should "improve of skills and problem solving and help students to make judgements based on the right content knowledge." Miyagi indicated that social studies could also help students to improve their thinking skills and make judgements, so "we have to address controversial topics for students."

## Contextual forces/challenges

Respondents cited many reasons for choosing not to teach controversial issues: 1) controversial issues were not a part of the explicit teacher education curriculum, 2) time constraints, 3) curricular constraints, 4) feeling the need to remain or seem neutral on issues, and 5) standardization of content which keeps teachers from changing the content.

Kasumi said, "I want the student to discuss more, if I have time. But the reality is I don't have time." Kasumi cited a "need to follow this curriculum" as resulting in a lack of time. Although "we are fortunate to teach contemporary society to these students, teachers need to focus on the college entrance exams, and the student needs to prepare; not enough time to teach or discuss."

If the high stakes exams weren't in place, Kasumi felt parents, administrators, and the school board would support teaching controversial issues. Also, she suggested, if the college entrance exam questions could be changed to open response items, then there could be cascading effects on approaches to teaching and teaching controversial issues. Kasumi indicated that "the image of social studies could be changed. Many students think [that in] social studies [class] they should memorize everything then they could pass the entrance exam; student should know more basic information on the topics for controversial issues, but nowadays student don't want to learn, but only memorize. So now is the challenge to change student thinking about social studies from memorization to more thinking."

Juro indicated that "in world history classes I don't ask such questions to students. In contemporary society class, three years ago I did. But not in world history and politics." He suggested that in world history there is "not enough time and also no time to ask questions to students." Moreover, in the politics class, "there is too much to cover and it is harder to ask in this class, which has so many students in it." As a result, controversial issues are located in elective courses.

Juro also suggested that textbooks, exams, his own passions, and too many students in classes undermine the treatment of controversial issues, but he indicated general support

from administrators and parents should he choose to engage in their treatment. The history curriculum generally "has too much information" and Juro felt "some figures should not be taught. The important ones, yes, but students should understand more of the whole picture, not the detailed information. The students need to see the bigger picture."

Takashi suggested that there are many controversial issues, including territorial disputes and labour conditions for the young and working poor, but the most important one is the change of the Constitution. Takashi felt "the discussion should be about the future of that." Constitutional Article 9, including the Japanese renunciation of war and military use, as well as the civil defense force, is hotly contested.

Shirou indicated that his rationale for teaching controversial issues was not developed in teacher education, since it was not covered, but he "did see this being taught which is helpful for now." Although "professors didn't provide anything about controversial issues instruction... they would ask questions at the beginning to think about. Students then thought about the topics sometimes together and summarized the topics and thought about questions for the rest of the classroom and students discussed and criticized the ideas." Ultimately the school curriculum and study guides furnished by the Ministry drive what is taught "which doesn't include many controversies."

Tomo "wants to teach some controversial topics but I want to take some balance—I don't want to promote any parties or religions. Some other teachers want to avoid controversial issues and only teach superficial information to the students." Tomo indicated comfort women and the Holocaust in Germany as controversial issues, but "teachers don't have to teach about comfort women—textbooks do address this. I don't teach about comfort women because I don't have enough time to teach. That could be in Japanese history, so maybe they teach that in that class. But I don't think most people want to teach about that because the issue is too political."

Tomo felt she could teach controversial issues in the rest of the school year, including about comfort women, nuclear weapons, the economic gap, women in society, and raising children. But when "I talk about controversial issues I might not be neutral so I could provide more materials to students. But I don't do that. I am not ready—I'm busy preparing for the teaching license exam. I have no time to answer student questions but I'm encouraging them to ask questions, but most students are shy, so they don't ask in the classroom. I encourage them to write down things; I'm listing all questions and trying to answer all questions in the next term."

Tomo felt the greatest challenge to effective socials studies education in Japan is the gap between research and practice. Teachers "try to use lesson plans but sometimes they are not working." Also, many teachers with teaching experience "don't want to read long research papers. They just want quick lessons. I want to introduce more research to the rest of the teachers and open more lesson plans to other teachers and reduce the gap between research and practice."

Taki desired more time for discussion of issues but admitted that students still need to take the test and exam, as well as the college entrance exams. He indicated that "covering the content in textbooks is his main responsibility" and "students don't know much about basic information, like the political process." Without basic content knowledge, "they can't think about whether we should change things like Article 9. It is impossible unless

we have more knowledge about these topics. Students need to know more about the basic content first." Taki, therefore, suggested that the greatest challenge to successful social studies education in Japan is "discussion and the use of discussion. Japanese kids are shy, and they don't want to share their opinions and they are not taught how to make comments in the classroom." If students say something "then the rest of the class might say something negative—so many students don't want to make comments in the classroom setting."

Ichikawa said, "I don't provide many opportunities to make judgements, usually once or twice a year." Because his school "is one of the best in the prefecture, with so many students going to the universities and colleges, the teacher should cover the content of the textbooks and so there is not enough time." In addition, the contemporary issues course meets two hours per week, so there is "not enough time for such opportunities."

Also, because of the nature of the school with many students entering the university, he felt time limitations contributed to not "teaching these topics well." In reality, "I don't teach these controversial issues (Nanjing and comfort women) but I do teach other issues. It could be hard to find controversial topics in Japanese history, but in civics, I could." When asked why he did not want to talk about it, he suggested he had "no desire to talk about them because of time issues. There is not enough time. There are important issues to discuss, but I don't because of the time issue." Ichikawa stated that he "covers the content and teaches the knowledge to students to take entrance exam. Practically, the entrance exam only checks content knowledge, not student thinking and I need to teach the content so they can take the exam."

Miyagi pointed to time as a core contextual issue as well, "I want to teach more and spend more time on this, but the time pressure so I try to finish it in one or two periods." He contended that students do need to know the content knowledge, but that the exam requires students to think about some topics.

### Reasons to teach controversial issues

Despite the aforementioned reasons for not teaching controversial issues, some respondents do try to incorporate the issues in their curriculum. Kasumi indicated she teaches some of these topics, but they "are not the centre of the classroom. I don't choose any particular topics for each class, but I show multiple perspectives for these topics." She also asks "students to use newspapers to see views of different perspectives. I want the student to discuss more, if I have time."

Takashi indicated that social studies educators should address controversial issues primarily "because Japanese people didn't use to address these topics as a society [but] in this global society Japanese people should introduce and talk more about these openly so students can improve their communication skills and critical thinking skills and views and cultural differences and local issues." He primarily focuses on teaching topics students are interested in, even if they are not within the Ministry of Education guidelines. He feels he "can choose any topics to teach. I think about how to raise the topic for students, thinking about the exam but mostly about their background, not having any practice with discussion and debate."

Juro asserted that the death penalty, nuclear power, and territorial issues, including those with China, Korea, and Russia are controversial issues. When asked if students really

cared about territorial disputes with Russia, he indicated that students "think this is part of Japan. But when I explain about the territory from another perspective, that most are Russians, then student see this another way. I teach both ways." When studying the death penalty, he asks students to read documents, write essays, then read their essays to the rest of the class, and share their opinions with classmates.

Shirou is able to address controversial issues in the current events class as there are only four students enrolled. First, he distributes materials, then summarizes what was learned, and engages in "questions and answers." By "teaching the materials," he indicated, "… most of the students are visual learners, I show the PowerPoint and maps and pictures and chronological events." Shirou noted that he tries to "speak about controversial issues every time, but the reality is I do not. It would be hard to do."

Tomo indicated that "in my classroom, I ask about the presence of nuclear weapons and some student said we don't have to have them and other said even if we don't have them, someone could produce them. Some students say they don't know why the nuclear weapons should be eradicated. They don't know the answers and they don't know how to disarm nuclear weapons in the world." As a graduate student, she recalled hearing about a conference about controversial issues instruction and she "knows how to use them in classrooms" such as the "lesson plan made by the other teacher for discussing nuclear weapons." As already noted, she "tries to be neutral, but if I give information about one side more, they could be influenced more by this side. So, I found it is hard to keep the neutral position when talking about controversial issues in the classroom

Taki tries to provide opportunities for students to "speak out but I don't want to share my own opinions with these students because now they seem passive and they could be influenced by my perspectives. I'm scared of sharing my ideas with the students. So that's why I don't share." But, because his new school is more technically-oriented and many students don't want to go to higher education, he indicated that he "can teach many topics that aren't related to the college exam." He asserted that it is important for students to address controversial issues because "through discussion and debate they could understand different ideas and perspectives and ideas could be changed or influenced by the ideas of others. They could understand better through this method." In total, he teaches a course for 50 hours, or two hours per week, five of which he uses to address these sorts of issues.

Ichikawa felt students should confront controversial issues. Once they graduate from high school and "go into society and they will experience these, so in high school they could be trained to tackle these issues." Ichikawa teaches these topics in Japanese history, but he felt he "doesn't teach well about both events—just superficial information." He regarded both events as "hard to teach without rich information and a balance of both sides. Some think differently about these and they are sensitive to many people." When asked to give an example, he explains that when he teaches about the death penalty, he addresses how it is done in other countries. He "teaches the information to the students but I don't ask questions of the students. I don't have any intention of having them engage in discussion. I taught this topic and then moved on." When asked why he did not want to talk about it, he said he had "no desire to talk about it because of time issues. There is not enough time. There are important issues to discuss, but I don't because of the time issue." After Ichikawa started teaching at this school, he found he had to teach to the test.

He "covers the content and teaches the knowledge to students to take entrance exam. Practically, the entrance exam only checks content knowledge, not student thinking and I need to teach the content so they can take the exam."

Miyagi addresses these issues by first teaching content knowledge to students, including different perspectives. On the topic of nuclear weapons, he asks students to research nuclear issues and "find some problems about nuclear weapons and identify questions about the issues and some resolutions about what to do about nuclear weapons." He also takes this approach to voting, asking students to think about the meaning of voting, identify questions, and find solutions for what to do."

In order to teach these issues effectively, he "use[s] various ways of teaching—giving basic information and a summary of ideas and topics and then students think about their topics. I ask questions of the students. I also use debates and simulations." Miyagi suggested that teaching controversial issues is difficult because of the structure of the textbook, which "mainly only cover theories—they don't describe particular things. At the schools where most students don't go to the universities, they are more actively centered." Miyagi felt many social studies educators "misunderstand the subject—they think content knowledge is best—but I think students can answer the exam questions better with thinking skills." Because of this, Miyagi indicated that most other social studies teachers focus on memorization for exam preparation.

## DISCUSSION AND CONCLUSION

Although Japanese social studies education is uniquely related in aims and goals with social studies education in the US, most respondents did not indicate that controversial issues education is part of their teacher preparation program. The absence of pervasiveness in terms of rationale is an immediate undermining force for gatekeeping decisions to teach about controversial issues (Thornton, 1991; 2001; 2006). Yet, respondents outlined a wide variety of social studies education goals in Japan, many of which are consistent with National Council for Social Studies (NCSS) goals (NCSS, 2010). Respondents suggested that having students grapple with multiple points of view is a primary goal because they construct beliefs about society and social issues.

In settings such as Japan, the extent to which teachers can "open the curricular-instructional gate; for whom, when, and which gates to what they open" (Thornton, 2006, p. 418) hinges upon the contextual features as found in the material, size, and weight of the gate, as well as the fence, in addition to the prevailing elements beyond the control and ken of the gate and fence. The surfeit of controversial issues respondents identified rarely enjoy exploration in social studies classrooms because the obstacles and barriers to controversial issues instruction in Japan are numerous and pervasive. The nature of the social studies subject matter, in the form of detailed Ministry of Education content directives, textbooks that avoid controversial issues, and the importance of the national exam all serve to direct teachers and students to testable declarative content knowledge not related to the aforementioned controversial issues. Pedagogical approaches are primarily of a direct instruction ilk, which further undermines opportunities for discussion or deliberation about controversial issues. In total, this instructional leitmotif points to a personally responsible paradigm of citizenship education (Westheimer & Kahne, 2004).

Respondents cited student and teacher habituation to this instructional paradigm, lack of time, few classes, student lack of knowledge for discussion, teacher lack of knowledge, and a general cursory approach to the content as reasons for not engaging in discussions. Respondents also described a debate paradigm within Japan, rather than discussion or deliberation, and the need for equal time and balance of both sides of an issue, which they either had scant time to provide or not enough perceived knowledge to structure. Respondents were also concerned that their beliefs might influence student beliefs or that their instruction might seem too political in nature. In addition, respondents did not want to engage in issues that lacked consensus and were not yet resolved, including "comfort women" and Nanjing.

In spite of these perceived barriers to controversial issues instruction, respondents did cite a number of pathways and possible entry points for other teachers to engage in these issues. For example, elective courses enjoy a great deal of opportunity for exploring controversial issues, primarily because there is no connection to the national exam and parents and administrators generally endow teachers with a great deal of autonomy and flexibility. All of the respondents indicated that under the right conditions, parents and administrators would be supportive, or at least not obstructive to, the teaching of controversial topics. Schools that are not academically high-performing are also better positioned to allow for controversial issue instruction given the comparatively less onerous effect of the national exam on teaching and learning.

Although a book series of teaching controversial issues was published in Japan and some respondents recognized the importance of teaching controversial issues, they also indicated that this was not part of their teacher education training and, in some cases, they had never considered the concept of a controversial issue. The controversial issues respondents cited were quite distinct from those Nishikawa (2005) advanced, and the status of controversial issues as inchoate or nebulous, rather than containing a "right" answer, served to thwart the interest of respondents in teaching about them.

The result of this research provides three points for improving social studies teaching and learning. First, teachers who actively make every effort to include controversial issues have a clear perspective of social studies education and clarity about what kind of controversial issues should be picked up. Secondly, in Japan, there are two categories of controversial issues that teachers select for their classes. One is the problem that occurs in a local community, for example, community planning. Another is the state scale problem, such as revising the Constitution and military defense. In Japan, the problems of religion and gender are hardly treated as familiar as they are in the US. Third, the selecting criterion of the highest priority is whether the problem is familiar to students. Teachers tend to regard student interest in learning as the most important point. Therefore, teachers often select the problems of the local community and avoid the issues of revising the Constitution and military defense. In the future, it is important to develop student understanding of state-scale problems.

Respondents' perspectives also suggest that the role of the textbook, while important, is not as singularly important as the literature would suggest. Rather, teachers and their attitudes about controversial issues are much more germane for understanding the extent to which issues are broached in classrooms. We did not find pervasive war guilt because respondents indicated that topics related to the war were either lacking consensus, not

known to students, too complicated, or too political. Respondents never mentioned the Yasukuni Shrine as a controversial issue nor did the "love of homeland" figure into avoiding sensitive historical topics.

We contend that controversial issue instruction within Japanese social studies classrooms is potentially moribund and more studies are needed to determine the extent to which controversial issues instruction occurs and find exemplars who negotiate variables and forces working in opposition. Miyagi highlighted the need for teachers to rethink how they teach for exams and the ways in which addressing controversial issues through discussion and inquiry is responsive to this aim, which we underscore as a policy recommendation. We suggest an expanded inquiry into his approach of confronting controversial issues, as well as case studies of other teachers who are finding successes negotiating contextual forces. In addition, we contend that social studies teacher education in Japan should revisit the rationale for teaching controversial issues and help future teachers develop their rationales. Without fully understanding the salubrious potency of this central concern of social studies education, teachers would find little reason to modify current instructional, curricular, and structural approaches to citizenship education within the social studies.

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# Preschool attendance and children's reading ability: A case of Narok County Kenya

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*This article reports findings of a study conducted in public primary schools in Narok County Kenya. A sample size comprising 74 children in Grade 3 (37 who did not attend preschool and 37 who attended preschool), 18 head teachers, 66 lower primary school teacher's and five education officers were selected for the study. Learners' reading ability was tested using the Kenya Early Grade Reading Assessment Tests for English and Kiswahili adapted from Department for International Development end line survey of 2014. Interviews of head teachers, teachers, and education officers were conducted. Findings revealed that children who attended preschool performed better in English sub-tasks than those who did not attend preschool. However, those who did not attend preschool performed better in Kiswahili than their counter parts. Teachers revealed that they create extra time to support children who did not attend preschool, which explains why such children performed better in Kiswahili.*

*Keywords**:** challenges in teaching preschool; children's literacy; children's reading ability; interventions in preschool attendance; preschool attendance*

## INTRODUCTION

Early childhood education provides a foundation for children's learning. It has an impact on children's readiness for primary school and transition to secondary education (UNESCO, 2015). McGettigan and Gray (2012) argue that familiarity with preschool helps children reduce feelings of anxiety on their first day in school; they note that children positively anticipate differences between preschool and school experiences. The first goal of Education for All (EFA) sought to expand and improve comprehensive early child care and education, especially for the most vulnerable and disadvantaged children (UNESCO, 2015). Provision of quality preschool education is also one of the key priorities under the post 2015 educational agenda. Kenya has since made strides in achieving this goal by encouraging children aged four to five years to acquire preschool education, as enshrined in the *Fourth Schedule of the Constitution of Kenya 2010* (Republic of Kenya, 2010), *Kenya Vision 2030* and the *Basic Education Act of 2013* (Republic of Kenya, 2007, 2013). All these legal frameworks are meant to enhance access, equity, and quality in early childhood education, especially for children from the Arid and Semi-Arid Land (ASAL), and those from poor households.

Getting a good foundation in early childhood education yields future benefits, such as better learning in school and higher educational attainment, resulting in major social and economic gains for society. The efficiency of the entire education system can be increased by improving children's readiness to learn, reducing repetition of classes and dropout from school (UNESCO, 2015). Dockett & Perry (2010) maintain that parents who are keen on their children's progress when they start school sometimes get frustrated by

teachers who share information on their children's adjustment challenges to the school environment. They further argue that teachers, on their part, get frustrated when they try to discuss with parents how children react to school when children are pushed by parents to achieve academically at school. To support children to attain pre-literacy skills in a natural learning environment without being pushed for academic achievement actually requires parents and teachers to consult with one another. Children who have attended preschool find that they have fewer toys and play opportunities at home than they had in preschool, indicating that attending preschool gives children an opportunity to learn to interact with other children through play (McGettigan & Gray, 2012).

Preschool education also fosters development of basic skills that enable children to interact positively with peers. McGettigan & Gray (2012) noted that, in preschool, children learn how not to cry, not to be shy, and to be good; skills that promote interaction with other children. The children also learn rules of where and when to line up for class, and how to listen for the school bell and to adults. A child equipped with these skills can more easily avoid trouble with teachers and with other children when they go to school.

Learners lacking such skills risk being rejected by peers and perform poorly in academic lessons (Knight & Hughes, 1995, Taiwo & Tyolo, 2002). Therefore, early childhood education is a crucial stage when a child is expected to attain foundational pre-literacy, pre-numeracy, and life skills essential for school readiness and quality learning.

Uwezo (2014) revealed that 48% of children aged 3–5 years in Narok County, Kenya, were not attending preschool in 2013. The report further indicated that 80% of Grade 3 learners in Narok County could not do Grade 2 level literacy and numeracy tasks. Ouko (2015), in his study on determinants of Grade 1 children's achievement in literacy and numeracy, established that attending preschool before joining Grade 1 determines children's achievement. According to his study, children who attended preschool before joining Grade 1 scored better in literacy than those who did not. The differences in performance were found to be statistically significant. The findings further show that attending preschool education gives children a firm foundation in their literacy skills.

Early childhood education in Kenya was devolved to the county government and has been operating under a national early childhood policy framework developed in 2006. The framework, however, has not adequately responded to the needs of devolution in Kenya (Republic of Kenya, 2006). The policy has now been reviewed and aligned to the devolved government systems specified by the *Constitution of Kenya 2010*, which designated pre-primary education as a function of county government.

## Language policy in Kenya

English is Kenya's official language and a language of instruction in the education system in Kenya. This has been the case since independence in 1963 (Nabea, 2009). However, Kiswahili is a co-official language and the national language used for communication by many Kenyans in rural and urban areas (Nabea, 2009; Ogechi & Ogechi, 2002), with many Kenyans being inadequate users of English for communication. Hungi, Njagi, Wekulo, and Ngware (2017), in their study on the effects of language of instruction on learning literacy skills, noted that learners taught literacy using Kiswahili out-performed their counterparts taught using English. This indicates that using the language of the catchment area that children are familiar with will influence how children acquire literacy skills. Mwoma (2017), in her study, revealed that using a child's mother tongue/first language to introduce reading is more effective for enhancing children's literacy skills.

Different countries in Africa adopted language policies depending on the country's political orientation and local circumstances (Mcllwraith, 2015). The language policies aimed to promote all Indigenous languages in a country to a national level to be used in public functions, including education. In the colonial era, Kenya adopted English as the official language. Since then, various government commissions on education have endorsed the use of English as a language of instruction in primary and secondary schools through to University, while Kiswahili is used in education to enhance national and regional unity because it is the language that is most commonly spoken in rural and urban Kenya (Mcllwraith, 2015; Nabea, 2009; Oduor, 2010).

The Ominde Commission of 1964 recommended that English be used as a medium of instruction from primary to university level. The Mackay Commission of 1981 endorsed this position on the use of English as a Language of Instruction while Kiswahili was made a compulsory examinable subject in primary and secondary school (Mcllwraith, 2015; Nabea, 2009; Oduor, 2010; Omollo, 2014). The Gachathi Report of 1976 recommended the use of the mother tongue as a language of instruction from Grade 1 to 3; this was further endorsed by the Koech Report of 1999. Even with these recommendations and endorsements, English and Kiswahili languages are the most preferred languages of instruction in most primary schools from Grade 1 to university. This, therefore, explains why most schools in rural and urban areas use the two languages, negating the good intentions of the language of instruction policy.

## Learning to read

Reading helps learners expand their thinking skills, concentrate, and enlarge their vocabulary. However, reading is a complex act requiring many years of experience and use in order to do well. Successful reading and writing involve comprehension, fluency, mastery of essential strategies, and motivation (Strategic Marketing and Research, 2013). English reading and speaking are based on the alphabetic principle focusing on letter sounds which acquire meaning when the sound units are combined. Before reading or spelling, children must understand that written words are made up of sounds or phonemes.

Piper and Zuilokowski (2016), in their study on the role of timing in assessing oral reading fluency and comprehension in Kenya, noted that students did not read fluently in either English or Kiswahili, having a mean fluency rates of 9.8 words correct per minute in a Kiswahili passage and 14.3 words correct per minute in an English passage. Similarly, there were low results in reading comprehension with an overall mean of 9.8% correct in English and 15.1% correct in Kiswahili. The low percentage was an indication that children were not able to answer comprehension questions correctly.

Uwezo's (2014) Annual Learning Assessment report revealed that, in 2013, overall only one out of every five children in Grade 3 was able to do Grade 2 work. According to the Uwezo's report, learning levels in Narok County were below the national average. On average, one out of five, and three out of ten children in Grade 3 could read a Grade 2 English and Kiswahili story, respectively. It is against this background that this study was undertaken as a community-driven research, to assess Grade 3 children's reading ability in relation to attending preschool education.

## Early Grade Reading Assessment (EGRA)

The Early Grade Reading Assessment (EGRA) test focuses on oral reading fluency with timed and un-timed items, testing children's comprehension skills in literacy (Piper &

Zuilkowski, 2016). Over the years, there has been expansion in the number of children accessing primary education in Kenya; however, that has not translated into school quality (Piper & Zuilkowski, 2016; Sifuna, 2007). As alluded to earlier, most children in Kenya are taught English as the language of instruction and Kiswahili is a compulsory language that is examined at the Kenya Certificate of Primary Education as well as in the Kenya Certificate of Secondary Education. Thus, children from as early as Grade 1 are taught to read using the two languages, English and Kiswahili, neither being their mother tongue (Dubeck, Jukes, & Okello, 2012; Piper & Zuilkowski, 2016).

This article documents findings from a study seeking to answer whether attending preschool influences children's reading ability; specifically, the study sought to answer three research questions:

1. Is there a significant difference in reading abilities between Grade 3 children who had attended preschool and those who had not?
2. Why do children not attend preschool?
3. What challenges do teachers experience when teaching children who had not attended preschool?

## METHODOLOGY

A mixed methods research approach involving concurrent quantitative and qualitative data collection was employed for this study (Creswell, 2012; Tashakkori & Teddlie, 1998). Quantitative data was derived from children's literacy assessment using the Kenya EGRA tools for English and Kiswahili adapted from Department for International Development (DFID) end line survey 2014. Qualitative data was derived from key informant interviews and group interviews.

### Site of the study

The study was conducted in Kenya, one of the East African Countries. Kenya is bordered by Tanzania to the South, Uganda to the West, South Sudan to the North West, Somalia to the North East and Ethiopia to the North. Narok County is found to the Southern part of Kenya and is inhabited by the Maasai people, who are pastoralists. As indicated earlier, Narok County has been performing poorly in literacy skills (Uwezo, 2014) despite the general improved access to primary education because of the free primary education policy. Two sub-counties (Narok North and Narok South) were selected for this study since schools in these sub-counties were being supported by the funders of this study. The focus of this study was Narok County, which, according to Kenya's 2014 education statistics, has 587 public schools and 32,469 children in Grade 2 in 2014—who could have been in Grade 3 in 2015 when this study was conducted—with an estimated mean class size of 55 learners (Ministry of Education Science and Technology, 2014). However, chances are that the numbers could be higher or lower as actual enrolment for all the schools in Narok County was not recorded during the study, this factor being one of the limitations to the study.

### Research participants

Participants for this study comprised Grade 3 learners who attended preschool before joining Grade 1 and those who did not attend preschool. The purpose of selecting the two categories (attendees and non-attendees) was to establish whether there was any difference in their reading abilities. Eighteen head teachers from the selected schools also

participated in the study to give their perception on preschool attendance and children's reading ability as well as the challenges teachers face in teaching children who had never attended preschool. Teachers who were teaching lower primary participated in the study to give their perspective on whether preschool attendance influence children's reading ability and whether they experience any challenges teaching children who did not attend preschool.

### Sampling technique and sample size

Systematic random sampling was utilized to select schools that participated in the study. Twelve schools from Narok North Sub-County and six schools from Narok South Sub-County were sampled for this study. Systematic random sampling was also utilized to select boys and girls who attended preschool while purposive sampling was utilized to select those who did not attend preschool in Grade 3. A total of 74 Grade 3 learners were sampled for the study from a total of 711 Grade 3 learners (399 boys and 312 girls) from the 18 public schools that participated in this study, comprising 37 children who attended preschool and 37 who did not attend preschool. Eighteen head teachers, 66 teachers, and five education officers from Narok County also participated in the study.

### Research team

The assessors were graduates from universities who were from the locality speaking both English and Kiswahili as well as the local language (Maasai) to ensure that they speak the local language for children who might have problems understanding the two non-local languages. The assessors were inducted for two days by experts conversant in the use of EGRA tests for assessing children's literacy skills. The induction was to familiarize assessors with the EGRA assessment tools as well as provide them with an opportunity to pre-test the tools to have a feel of the actual assessment. A one-day debriefing session was held to allow assessors to share their field experiences as well as seek clarification from the trainers on any difficulties encountered during the pre-test of the tools.

### Data collection tools

Data collection for this study was carried out in June-July 2015. A triangulation of methods was applied to collect data. Learners' literacy skills in English and Kiswahili were assessed using EGRA tools. Key informant interview schedules were utilized to collect data from head teachers, County Director of Education (CDE), County Quality Assurance and Standards Officer (CQASO), Teacher Service Commission County Deputy Director (TSCCDD), Sub-County Quality Assurance Standards Officer (SCQASO), and Sub-County Education Officer (SCEO). Group interviews were conducted for teachers teaching lower primary grades. Desk review was conducted to inform the study in relation to children's school attendance and their reading ability.

### Measures

The measures used to collect data on children's reading ability was EGRA literacy assessment tests focusing on English and Kiswahili, the two official languages of instruction in most Kenyan schools. The difficulty levels of EGRA tests followed the expectations of the Kenya Institute of Curriculum Development for Grade 1 pupil's literacy. The assessment tools tested letter sound knowledge, vocabulary, word decoding, oral passage reading, and sentence reading and comprehension. The assessment consisted of both timed and un-timed tests. The timed assessment was to ensure that all children

had equal opportunities to read the letter sounds, words, and passage. The un-timed assessment was to ensure that children could read sentences and a simple story and answer simple questions concerning the story.

The assessment tools consisted of 100 letter sounds, passages of approximately 60 words with five comprehension questions, a timed story of approximately 40 words for both English and Kiswahili with four reading comprehension questions. In assessing vocabulary, children were required to name body parts, and place objects in different positions as directed by the assessor.

Assessors administered the tests starting with letter sounds, followed by simple words, then vocabulary, paragraph, and, finally, the story for both English and Kiswahili. Each of the timed tasks took 60 seconds and the assessor would put a slash on the letter sound or word the child read at the end of 60 seconds and ask the child to stop. The assessor could encourage the child to continue reading while taking note of the letter sounds or words not read correctly by making a mark.

### Reliability and validity of Data

To enhance reliability of the findings, triangulation of data sources was utilized; that is, responses via quantitative statistics from EGRA were corroborated with verbatim responses from interviews (Creswell, 2012; Tashakkori & Teddlie, 1998). Credibility of the findings was enhanced by the principal investigator ensuring that data from various participants was captured to generate enough themes to answer the research questions. Further, trustworthiness of qualitative data was enhanced using verbatim responses from participants.

### Data analysis procedures

Both quantitative and qualitative data were cleaned in preparation for entry and transcribing, respectively. A coding frame was developed following themes of the study, and an entry platform on STATA 13.0 was developed for quantitative data based on the EGRA tools for English and Kiswahili. Qualitative data was then transcribed and made available in word format. Analysis of qualitative data followed the thematic analysis procedures, and descriptive and inferential statistics were applied to analyse quantitative data. A t-test was utilized to test for significant differences in means in children's reading ability between those who attended preschool and those who did not.

The principal investigator offered an initial preliminary analysis based on the preliminary findings from quantitative data on Grade 3 children's reading ability assessment data and a read through of the field notes. The intent was to identify issues that needed further clarification and inconsistencies, and to craft further questions to allow for more data collection.

Once the data collection period concluded, the dataset was analysed as per the analysis framework and themes developed for the purpose of the study. Further, the information from interviews with groups and individuals was analysed to corroborate and validate the information.

### Ethical considerations

Approval to conduct the study was granted by the County Director of Education Narok County. Permission to conduct the study in each school and to assess Grade 3 children's

reading ability was granted by head teachers of the schools that participated in the study. Oral consent was obtained from participants. To enhance confidentiality, no names of participants or schools are mentioned in this article. Letters of the alphabet have been used to identify the schools that participated in the study. Participants have been identified as teacher, or head teacher by the letter representing the school when using verbatim responses. Education Officers interviewed have been identified by their titles and not names.

## RESULTS

Findings for this study were obtained through learners' assessment tests as well as interviews. The interviews focused on participants' knowledge and perceptions of children not attending preschool before entering Grade 1; reasons why children do not attend preschool; and challenges teachers experience when teaching children who had not attended preschool.

### Preschool attendance

The study was designed such that an equal number of children who had and had not attended preschool were sampled from each school for assessment. The total number of pupils assessed in English and Kiswahili was 74 as shown in Table 1.

**Table 1: Preschool attendance by gender**

| Gender | Attended preschool | Had not attended preschool | Total |
|---|---|---|---|
| Boys | 20 | 17 | 37 |
| Girls | 17 | 20 | 37 |
| Total | **37** | **37** | **74** |

Table 1 shows that slightly more boys than girls attended preschool before joining Grade 1. To gain insights on preschool attendance, the study explored the reasons why children could not attend preschool before joining Grade 1. Findings from groups and individual interviews are presented below.

### Reasons for children not attending preschool

It emerged from interviews that some children do not attend preschool because of cultural practices that give preference for education for boys rather than girls and the tendency for early marriages among girls. Participants revealed this by saying: "Cultural factors where parents give preference to educating boys than girls contribute to girls not attending preschool (SCEO)."

Illiteracy among parents and lack of role models from successful people from the community who attended preschool and are excelling were also reported as reasons for children not attending preschool. The CDE and the SCEO pointed out that "[s}ome parents are illiterate and therefore do not see the importance of taking their children to preschool (SCEO)."

Lack of preschool centres in remote areas coupled with long distance from home to school were mentioned as contributors to children not attending preschool. The CQASO revealed that: "[l]ack of early childhood centres in the remote parts of the county has made parents to hold their children at home until they are big enough to walk to school,"

The CDE added: "Distance from home to school is a barrier for parents to allow their children attend preschool."

Fear of attack by wild animals was reported as a reason that prevent parents from allowing young children to attend preschool. The TSCCD and the CQASO confirmed this by saying: "Wild life may scare young children from going to preschool."

Poverty was also identified as a reason why some children do not attend preschool. During the dry season, many animals die and parents are unable to raise money to pay fees for attendance of children at preschool. The head teacher from school F noted this by saying: "When there is drought like the one in March, animals die and this makes parents poor. Thus they prefer to keep children at home to reduce on school related cost" (Head Teacher School F)."

Another cause is polygamy, in which some families have many children whom they are not able to educate, prompting them to educate some children and have others herding cattle. As one head teacher from school F put it: "Families in the area are big, polygamous and with many children per wife. Fathers decide on the children who need to join school per wife. The rest of the children are asked to go herding (Head teacher school F)."

While attending preschool education is deemed critical for providing children a firm foundation in literacy skills, it is apparent that several factors are bound to prevent young children in Narok County from attending preschool. The factors include, lack of preschools in remote areas, cultural practices, lack of role models, polygamy, and fear of being attacked by wild animals. The findings imply that Narok County government should put measures in place to ensure that all children have an opportunity to attend preschool before joining Grade 1.

## Preschool attendance and children's reading ability

The first research question sought to establish whether there was a significant difference in reading abilities between children who attended preschool and those who did not. Reading ability was measured based on seven sub-tasks: letter sound fluency, decoding fluency, segmenting, reading fluency, and vocabulary. It also focused on reading comprehension and sentence comprehension.

A t-test was utilized to establish whether there were significant differences in mean scores between the reading abilities of children who attended preschool and those who did not. Statistical significance was defined at 0.05 with a 95% confidence interval. Tables 2 and 3 show the results of the tests to this question.

For English reading ability, the results indicate that, overall, children who attended school had slightly higher mean scores in five out of seven subtasks than children who did not attended preschool. However, the difference in mean scores between the two groups was not statistically significant at $p>0.05$. The findings imply that while children who attended preschool performed slightly better than those who did not, chances are that teachers spent more time supporting those who did not attend by coaching them, which enabled them to improve in their reading ability.

**Table 2: Effect of attending preschool for English**

| Subtask | Attended preschool | | Had not attend preschool | | Significance |
|---|---|---|---|---|---|
| | **Mean** | **Standard error** | **Mean** | **Standard error** | |
| **Letter sound fluency (clspm)** | 18.8 | 2.6 | 20.0 | 3.1 | 0.77 |
| **Decoding fluency (cnwpm)** | 21.2 | 2.2 | 19.4 | 2.3 | 0.56 |
| **Segmenting (%)** | 20.8 | 4.3 | 17.8 | 3.9 | 0.61 |
| **Reading fluency (cwpm)** | 38.4 | 3.9 | 37.3 | 3.7 | 0.84 |
| **Vocabulary (%)** | 53.1 | 2.4 | 56.8 | 2.6 | 0.31 |
| **Reading comprehension (%)** | 24.3 | 4.6 | 23.2 | 4.1 | 0.86 |
| **Sentence comprehension (%)** | 55.1 | 5.1 | 41.4 | 6.2 | 0.09 |

Significant at $p<0.05$*

Results for Kiswahili subtasks were opposite to those observed for English. In Kiswahili, a statistically significant difference at $p<0.05$ was noted in decoding and listening comprehension subtasks between children who did not attend preschool and those who attended. The results indicate that children who did not attend preschool read non-words better and had better understanding of the Kiswahili story read to them than those who attended preschool, as shown in Table 3.

**Table 3: Effect of attending preschool for Kiswahili**

| Subtask | Attended preschool | | Had not attend preschool | | Significance |
|---|---|---|---|---|---|
| | **Mean** | **Standard error** | **Mean** | **Standard error** | |
| **Letter sound fluency (clspm)** | 22.3 | 2.9 | 27.5 | 3.7 | 0.28 |
| **Syllable fluency (cspm)** | 38.2 | 3.3 | 46.6 | 3.6 | 0.09 |
| **Decoding fluency (cnwpm)** | 16.6 | 2.0 | 24.3 | 2.5 | 0.02***** |
| **Reading fluency (cwpm)** | 26.8 | 2.7 | 34.7 | 3 | 0.05 |
| **Reading comprehension (%)** | 30.3 | 4.9 | 33.5 | 4.7 | 0.64 |
| **Listening comprehension (%)** | 47.0 | 4.5 | 62.2 | 5.7 | 0.04***** |
| **Words/Nonwords (%)** | 59.7 | 3.5 | 56.1 | 3.7 | 0.48 |

Significant at $p<0.05$ *

The significant difference noted in listening comprehension and decoding fluency in Kiswahili among children who did not attend preschool could be attributed to the fact that teachers spent more time coaching these children, which was not the case for children who attended preschool.

## Challenges experienced by teachers in teaching children who had not attend preschool

The third research question sought to establish the challenges teachers experience in teaching children who had not attended preschool. It emerged from qualitative data analysis that various challenges are experienced by teachers. Children who had not attended preschool experience difficulties in reading and writing as a result of missing

the basic pre-literacy skills acquired at preschool. Teachers, in responding to this challenge, spend extra time supporting them. Participants revealed this by saying: "Most of the non-attendees do not know how to read and write" (Head teacher school A). Creating extra time to attend to children who did not attend preschool could explain why they performed better in Kiswahili in listening comprehension and decoding fluency.

Delay in completing grade work was cited to be a challenge that derails syllabus coverage on the part of teachers. Such children were reported to be lagging behind those who attended preschool. As mentioned earlier, it required teachers to create extra time to coach children who had not attended preschool so they can catch up with those who had attended. Some children also became disappointed when they were not able to perform as well as their peers in literacy tasks. The head teacher from school C reported this by saying: "These children get disappointed when they realize they cannot answer a question that was in the lower level (Head teacher school C)".

Although findings from children's assessment create an impression that children who had not attended preschool were better at reading in Kiswahili, the qualitative data reveals that teachers experience challenges supporting them so that they can catch up with their peers. Kiswahili, being a national language spoken at home and in school, becomes easier for children who had not attended preschool to use, while those who attended preschool have an advantage when using and understanding English, which is also often used in teaching subjects in school. It is imperative, therefore, to encourage parents to take their children to preschool to acquire the pre-literacy skills that prepares children to acquire language skills at higher levels of learning. This is especially important since children who had not attended preschool were challenged by writing exercises and English comprehension.

## DISCUSSIONS OF THE FINDINGS

### Preschool attendance

Access to good quality preschool education impacts positively on a child's educational outcomes in primary school with effects reflected into later life (UNESCO, 2015). Dockett and Perry (2010) established that starting school early is associated with later school success both socially and academically. This is because the foundations for all learning are laid in the early years of a child's development. Notwithstanding the importance of preschool education, the current study revealed that 37 children assessed did not attend preschool, implying that such children might have missed an opportunity to acquire the foundational basic literacy skills. Among the foundational skills they missed are pre-writing and pre-reading skills; this was evident because they experienced writing and reading problems—except for listening comprehension in Kiswahili.

It also emerged that slightly more boys than girls attended preschool before joining Grade 1. Cultural practices where boys are given preference for education and girls left to perform household chores and looking after their younger siblings coupled with early marriages were cited as factors that influence non-attendance at preschool. Other reasons given include: illiteracy among parents, lack of preschool centres in remote areas, fear of wild animals, and distance from home to school.

There is need, therefore, for education stakeholders to ensure that all children are supported to attend preschool before joining Grade 1 to enable them to acquire

foundational basic literacy skills. This requires the county government to work hand-in-hand with other education stakeholders to advocate for preschool attendance in remote areas by constructing preschools, and to task chiefs to ensure that all children in their jurisdiction attend preschool before joining Grade 1. Sensitization seminars for parents on the importance of preschool education should also be encouraged.

### Preschool attendance and children's reading ability

Research has shown that there is a direct link between preschool education and academic achievement. Children who have been exposed to preschool education prior to joining primary school make better use of learning resources than those who had not been exposed (Myers, 1992, Taiwo & Tyolo, 2002). Taiwo and Tyolo (2002), in their study, noted that children with preschool experience out-performed those without such experience. Such children tended to acquire certain skills that enable them to make an easier transition to the primary school environment. McGettigan and Gray (2012) also noted that familiarity with preschool helps children reduce their feelings of anxiety on their first day in school.

Findings from the current study were consistent with these studies in regard to children's performance in English and the qualitative data from teachers. However, in terms of literacy skills in Kiswahili, the findings were contrary to those found by Taiwo and Tyolo. The current study revealed that children who had not attended preschool had better mean scores in Kiswahili sub-tasks than those who had attended preschool. This could be influenced by the fact that Kiswahili is a national language that is spoken in rural and urban areas and, therefore, children found Kiswahili sub-tasks more familiar than sub-tasks carried out in English. It is important that the language policy requiring use of the language of the catchment area for instruction in schools should be reinforced, even while the official language (English) is introduced for instruction in schools. Kiswahili, being a national language spoken in rural and urban areas, should be utilized as a neutral language of the catchment area that children can easily use and understand, especially in the early years of learning.

Findings from interviews revealed that teachers experience many challenges in introducing literacy skills to children who had not attended preschool, compelling them to create extra time for individual attention to children who had not attended preschool. The findings, therefore, may be used to inform policy at the local and national levels to ensure that all children, especially those from pastoralist communities, are encouraged to attend preschool by sensitizing their parents on the importance of preschool education.

## CONCLUSION

Attending preschool is critical for laying the foundation on children's literacy skills. Findings revealed that slightly more boys than girls attended preschool before joining Grade 1. To improve preschool attendance among young children, the county government in collaboration with parents, NGOs, and other education stakeholders should do the following:

- Sensitize parents to the importance of preschool education by discouraging engagement in cultural practices that disadvantage girls from attaining education, such as early marriages or giving boys preference over girls for receiving education. Equal chances in education for boys and girls should be encouraged.

- Encourage construction of preschools in remote areas and closer to villages to guard children from walking long distances to existing preschools; this will also lessen the chances of children from being attacked by wild animals—especially important for children living close to the wildlife reserves.
- Encourage chiefs and assistant chiefs to be vigilant, requiring parents in their jurisdiction who do not comply with the *Basic Education Act 2013* to enrol their children in preschool before joining Grade 1.

Teachers, on their part, should impliment the language policy by utilizing Kiswahili for instruction because it is the national language used in rural and urban areas. This will give learners who had not attended preschool an opportunity to acquire knowledge and concepts in the language they are familiar with.

## Limitations

This study has two major limitations. First, the study focused on an equal number of children—those who attended preschool and those who did not—since the purpose was to compare their reading ability. The decision was arrived at since it was realized there were fewer learners who had not attended preschool before joining Grade 1 who were learning in Grade 3. This explains why the sample size was small since there were only 37 children who had not attended preschool and were in Grade 3 in all the sampled schools.

Second, our analysis on children's reading ability focused on the number of words children read correctly within 60 seconds without focusing on what would happen if children were not timed on the same tasks. Given the small number of participants in this study, findings cannot be genralized to other schools with similar characteristics but, instead, a similar study should be conducted using a larger sample that can be generalized to schools with similar characteristics.

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# Digital Storytelling, comics and new technologies in education: review, research and perspectives

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*This work reviews the current application of one of the most widely used techniques in education around the world: Digital Storytelling (DS), along with comic and animation tools, and presents a study about the Greek educational system as well as posing questions concerning the form of a new study, design, implementation and assessment of educational project across all educational levels. Nowadays, people and students at all educational levels in the developed world are surrounded by multiple electronic media and are familiar with a variety of pictures, video and information from early childhood. The educational process, as it proceeds in parallel with fast technological and societal evolution, tries to smoothly adjust new educational methods without abandoning traditional teaching and moving away from its main aim: the establishment of knowledge.*

*Keywords: digital storytelling; comics; multimedia; education*

## INTRODUCTION

Children have their first views of the world through tales and stories and, in this way, learn to communicate and share their feelings. As they pass into adult life, people tend to represent facts and behaviours through storytelling, so as to understand their social and cultural environment (Bruner, 1997). It is common sense that telling stories can attract one's interest. From the very beginning of storytelling and the era of cave arts, to our Internet and social networks' days of mass storytelling, creative people have explored ways to stimulate the imagination of others (Hulburt & Voas, 2011). Memories from our childhood include a familiar storyteller, usually a parent or a grandparent, accompanying our time before we go to bed.

By embedding storytelling in the classroom, learning is empowered; students are asked to adapt their knowledge, to investigate their assumptions and, through an iterative procedure, to write down the process of composing a concept. As stories reflect students' ways of thinking, teachers could use this fact to gain access to their personal progress through learning targets. With the support of new technological tools available in terms of physical devices (for example, tablets and smartphones) or software (media authoring tools), storytelling can become digital, amplifying the power of the story and bridging the high-tech world outside school together with the traditional low-tech school learning

(Ohler, 2008). Through the creation of their own digital stories, students actively take part in the learning process. In this way they do participate in the media-dominated world, they are not only passive watchers (Ohler, 2006).

In Gregory-Signes and Pennock-Speck (2012), a review is made on some of the most relevant studies on digital storytelling (DS). The authors propose an initial classification of DS into two main types: educational and social. DS is stronger in the world of education; however, it is rather difficult to separate the two types completely. In Dush (2014), the social impact of DS is emphasized when students are asked to work closely with people from nonprofit and community-based organizations in order to learn how to produce their own new media. The use of DS is even applied in an organizational setting, where people try to express their way of thinking and convince their business partners about it (van Boeschoten, 2011).

Of paramount importance is the selection of methods employed in educational research. A research methodology has to be carefully organized from the beginning so that results can be applied to a broader audience, not only the participants. A good research tactic, as discussed in Cronbach and Suppes (1969) and further analysed in Shulman (1997), is characterized as "disciplined inquiry". Disciplined inquiry leads to knowledge and knowledge in education (Frick, 2004), as long as some kind of generalizability is obtained. Disciplined inquiry uses either a qualitative or a quantitative approach, although mixing of the two approaches is also popular. For example, a qualitative research approach could be used in a case study, while a quantitative approach fits well for an experimental research in education, as reviewed in Evans (1998).

In the context of this paper, we discuss current applications of digital storytelling at all educational levels, investigate new technologies used in parallel when creating a digital story, like comics, animations, machinima and multimedia tools, and comment on the characteristics of educational tools used nowadays. Finally, we present a test case where a DS project has been applied to various classes in the Greek educational system in the last six years. We compare students' needs as years go by and as new technological tools enter all aspects of life. Emphasis is given on DS utilization as an alternative source of knowledge to assist teaching. The development of an educational tool is proposed that aims to serve current pedagogic concepts, fully taking advantage of possibilities arising from technology and functioning supplementary to teaching. The development team consists of a primary school ICT teacher, responsible for most of this work, a university ICT lecturer that assists with the literature and data processing and a Fine Arts School Professor that controls and reviews the whole process.

## REVIEW OF MODERN METHODS ADOPTED IN EDUCATION

As new technologies enter our lives, smartphones and tablets, cameras, and advanced software authoring tools have enabled teachers (especially ICT teachers) to embed innovative approaches in teaching and help students to construct their own knowledge and ideas to present and share them more effectively (Standley, 2003).

### Digital storytelling

DS has been applied in many countries' educational systems from preschoolers to university students, either as a research project or as an embedded learning process in classes. Hartley & McWilliam (2009) categorize the impact of DS in achieving learning

goals by students' age. During the primary education years DS is suitable for the stimulation of the student's interest, but it would not be advisable to focus on scientific or methodological learning. In middle grades, the emphasis shifts to DS for improved composition and narrative construction, as well as on basic media production skills. In older grades, the emphasis shifts to more advanced print and media literacies and to wider community applications of school digital storytelling, and the terminology used is more sophisticated.

Sylla, Coutinho, and Branco (2014) found that the interaction of pre-school children with DS seems to promote their imagination and creative thinking, as well as fostering early literacy skills and metalinguistic awareness. An interesting library activity based on a mobile game was introduced by Wood et al. (2014) to support DS among primary school children in public libraries to develop their creative reading and writing skills while at play. Wood et al. (2014) recommend that designers create playful digitally based activities that encourage children to explore libraries and get to know the physical books.

As students become familiar with new, nearly cinematic computer games, and interact with the virtual characters, they are potentially able to develop their own interactive stories. Charles, Mead, and Cavazza (2001) describe a model that adopts virtual reality, computer games and storytelling in parallel, engaging two major modes of interaction: physical interaction and linguistic interaction. Di Blass and Paolini (2013) conducted a large-scale project on the impact of DS on formal education in Italian schools. They found that DS promotes not only curricular benefits (like increased knowledge of a subject matter), but benefits such as the development of a professional attitude and improved relationships within the class. DS is one of the methods used for language proficiency development in English language learners (Won Hur & Suh, 2011). Through the student-computer interaction, DS can be particularly useful because it combines visual resources and speaking experience, which are essential to language learners.

Sadik (2008) found that DS encouraged students in basic education to think and act as individuals during the process of creating their stories. Science and mathematics lessons can be also the subjects of DS. Tan, Lee, and Hung (2014) note that, while it seems obvious to enhance knowledge in the social science, humanities, languages and literacy education, DS also works in science and technology classes. However, every task has to be prepared carefully in order to achieve pedagogical success. Valkanova & Watts (2007) found that DS is the key element for children playfully exploring science concepts and advancing their self-learning ability. Enriching the learning process with animations and simulations in science classes is also a field of investigation in Falvo (2008).

As classes move from "teaching-based" to "learning-based" approaches, DS stands out as the means of communicating religious issues for theologians (Hess, 2014). Suwardy, Pan, and Seow (2013) used DS to complement traditional classroom lessons on accounting, such as how to set up accounts, perform bank reconciliation etc. and thus assist students to learn better. In the work of Price et al. (2015), a DS project is conducted in student learning about complex topics, such as nursing education, through the application to personal stories and experiences.

The work of Kocaman-Karoglu (2016) presents the application of DS in a university course, where, conclusively, pre-service teachers found it as an attractive way to share ideas and feelings and wish to use it as an educational tool at school. Moving from under-graduate to post-graduate educational level, university students are encouraged to engage DS in their research. In this way, they participate in knowledge production processes,

which may inspire them to become experts in their fields. This contrasts with the traditional supervisor–student model, where the academic expertise, experience and authorial voice of the supervisor tends to overshadow the active involvement of research students (Ramble & Mlambo, 2014).

DS, as a means of the human-computer interaction process, may be applied to children with disabilities. It has been observed that many researchers do not understand how the life of children with disabilities may be and it is very difficult to create an interactive technology close to their needs. However, technology uptake has a positive effect on the children's education, as the incorporation of new means gives them a sense of ownership and empowerment (Frauenberger, Good, & Alcorn, 2012). For students with special needs within the primary and secondary curriculum, Smeda, Dakich, and Sharda (2014) argued that DS can provide support to them and concluded that it can help to improve their confidence and contribute to better social and psychological skills.

There are also cases where teachers perceive the technology that comes with DS to be beneficial to their students. Thang et al. (2014) observed that the teachers might resist accepting the role of technology in their classes. The authors believe that a transition phase to deal with emotional and social issues relating to change could be useful. However, if teachers are well-prepared and develop their personal skills in order to be able to guide students, then the whole process could be a fruitful experience for students to acquire IT and media skills (Sadik, 2008).

## Comics

Comics can be a familiar tool for supporting learning in the classroom. They have already entered the educational system of many countries, such as in French primary school. In the UK, comics have been used in the classroom for lessons such as literature, arts, and history, as well as comics as a lesson created by students themselves (Gibson, 2008). In Japan, manga comics have been used for more than 25 years, while in the US, comics are about to enter all educational levels with the project "*Maryland comic book initiative"*.

Comics in the classroom can be a good starting point for the teacher to discuss difficult meanings with the students, such as in literature (Jacobs, 2007; Versaci, 2001). In an early experimental work on the use of comics as an educational tool by Hutchinson (1949), it was found that comics have strengthened poor readers' desire to read well, for they see reading as an immediate means to obtain the full pleasure that can come from comics. Web comics (Vassilikopoulou et al., 2011) were used in language teaching and it was found that the comic creation process helps students acquire linguistic skills and to apply their imaginations and use their cultural experiences for creating multimodal texts.

Currently, a great number of comics are used as an exciting way of communicating science inside the classroom, as found in a review by Tatalovic (2009). For example (Zehr, 2011), a Batman comic was used as the vehicle for popularizing concepts of exercise science, neuroscience, and physiology. In this way, the author believes that science is translated into terms that are interesting and accessible to the general public and nonacademic specialists. Moreover, in a controversial science, such biotechnology, comics could contribute to the evolution of the human face of biotechnology through the world of colours, drawings and paintings that emphasize the cultured face rather than the delinquent side of humanity (DaSilva, 2004).

### Machinima

Technology has made it possible to incorporate new techniques in the representation of information, such as machinima (machine, cinema, and anime). Machinima is a contemporary storytelling and filmmaking practice involving the capture of existing animated characters (from video games or movies) in order to create a Do-It-Yourself film (Frølunde, 2011). Van Langeveld and Kessler (2009) presented a way of engaging engineering and fine arts university classes by focusing on games, special effects, animation and other areas that require interdisciplinary efforts for the current entertainment industry. Park (2012) refers to education acquired by modern digital experience for the user by online role-playing games.

### Multimedia tools

Multimedia learning is reviewed in Mayer (2002) when investigating how people learn in a multimedia environment. Significant factors and issues on multimedia design is analysed in Woo (2009). Modern multimedia tools designed and proposed for educational reasons are discussed by Lazarinis (2010) and Gordon (2006). Cordero et al. (2015) created and presented a tablet-based tool. Students that took part in the production of the tool seemed to be engaged with what they were doing and saw the proposed tool as a powerful one for fictional narrative creation. The success of such educational software must be supported by a teacher capable of supervising and guiding students to use it. Of importance is the assessment process accompanying an educational. In this way, the educator can investigate the percentage of learning targets achieved in every application and present the weak or the strong points of the tool (Saxton et al., 2014).

## A DIGITAL STORYTELLING COMIC-BASED TOOL

In this section, we present an implementation scenario that adopts contemporary educational techniques, such as digital storytelling with comics. It involves the development of an educational tool for primary school students. The presented tool is part of a broader educational tool being currently investigated for all educational levels.

In the digital storytelling tool, the teacher enters an objective, shows the learning object as a comics sequence and surveys students, and the tool automatically formats the level of satisfaction of the initial objective. Thus, the teacher has a complete teaching plan in digital storytelling with comics. Further educational activities with comics enhance student self-activity and place him/her in a designer and creator role. There is multiple assessment possibility; from the teacher towards the students, from the teacher for the estimation of the degree of satisfaction of the objective being set and the student self-assessment through the activities, the games and the multiple-choice questions.

### Participants

Shulman (1997) pointed out that generalization depends on the sample under investigation. Participants in our research included: 12 primary school teachers, 8 secondary education teachers, 4 university professors, 12 other individuals, and 358 students come from five primary schools in the cities of Larisa and Volos, Greece, and three high schools in Deskati town, Grevena, Greece. Student research was conducted during the students' classes of Informatics. The researcher served as the primary instructor in the course and guided the students to design, narrate and publish the multimedia file. Data was collected through questionnaires and interviews. Participants

were prompted to answer questions on renewable energy sources and general questions on the process.

## Data span

As our investigation focused mainly on technology issues and how digital storytelling improves the learning process, we present results over two years in time, in 2011, when our first results were gathered, and 2016. Apart from gaining knowledge through the comparison of results, we wished to be able to relate the method with technological evolution, which affects students' views of the educational process. A range of data was collected throughout the years and exists in our database. It is worth mentioning that technological evolution in terms of wireless devices, smartphones, virtual reality and their use by students even from the first classes of primary rose steeply between 2011 and 2016 (Smith, 2017). For example, back in 2011, only a small percentage of students were familiar with smartphones, since their prices were relatively high, and their capabilities limited. In 2016, most of primary school students were active smartphone users and familiar to the aforementioned technology issues. This was retrieved as an observation during our research and supported by relevant literature (Al-Harriri & Al-Hattami, 2017; Goksu &Atici, 2013).

## An example lesson

A test version of the tool was created with the use of software languages HTML, CSS and JavaScript. HTML was used for the working environment and graphics, and JavaScript for the programming demands of the application. The ability of JavaScript to run without the presence of a server (client-side scripting) allows the application to run both on the Internet and locally on the user's computer. Tool graphics are simple as they have been co-designed from primary school students as part of the learning process.

The log-on screen is presented on Figure 1, from which the user enters the system and chooses an available lesson, depending on his/her class. The user moves forward or backward with the relative arrow on the basic menu and reaches the lesson page with information on the lesson and the students. At this point, the teacher enters the lesson objective on the available text box and goes on with designing the application (Figure 2).

In this example, we refer to a general lesson of "*Renewable Energy Sources*". In Figure 3, the design canvas appears on the centre of the screen; backgrounds, pictures and characters relevant to this subject appear on the design database on the left of the screen, while on the bottom screen the selected (or the created) numbered scenes appear. The mouse coordinates appear on screen, as well as a text box which assists the user during the design. On the right side, there are various designing tools, such as pencils and erasers, colours, ready-to-use schemes, such as circles, rectangles etc. In addition, there is a link for entering textual and recorded/narrated messages.

As soon as the teacher ends with the design of the multimedia tool, she or he presses the presentation button from the basic menu and moves directly to the multimedia application presented to the students (a printscreen shown in Figure.4).

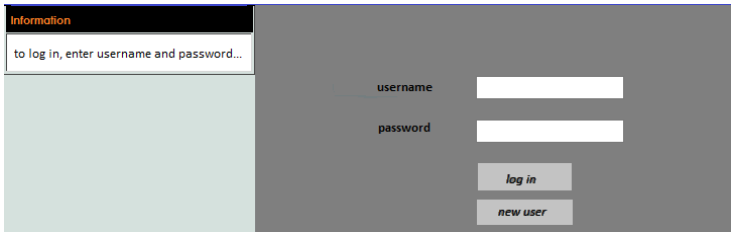


**Figure 1: Entering the application**

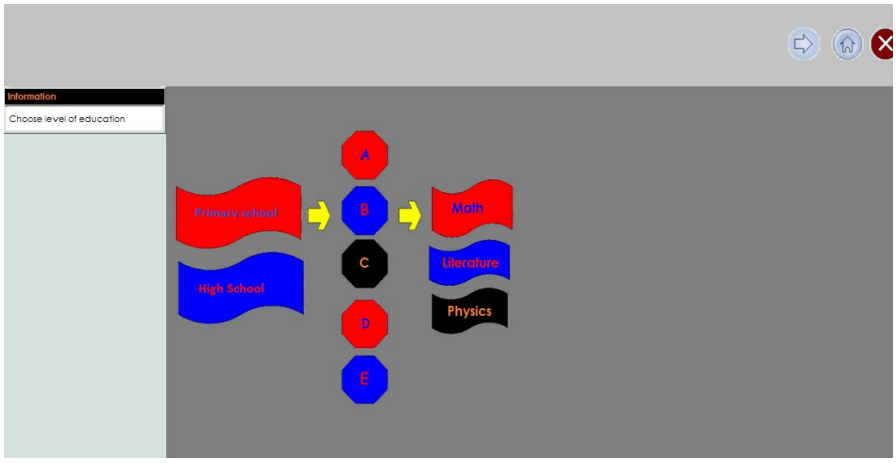


**Figure 2: Application menu**

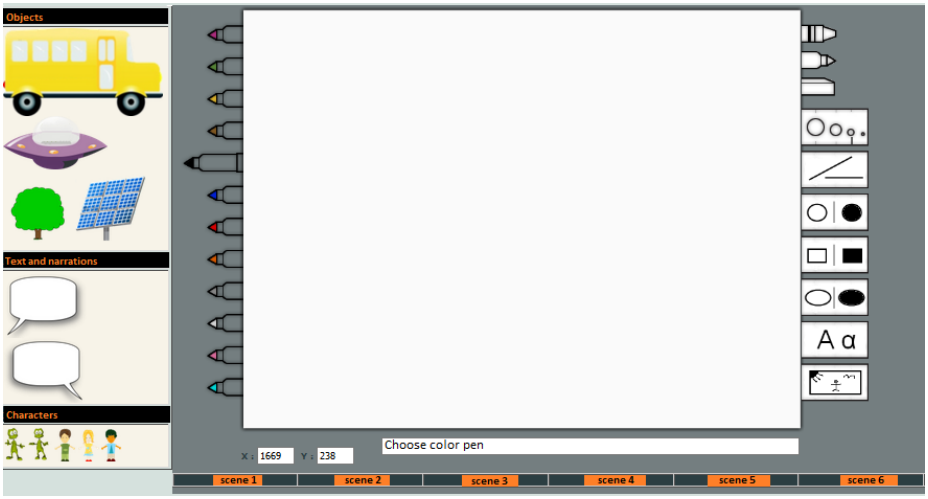


**Figure 3: The design canvas**

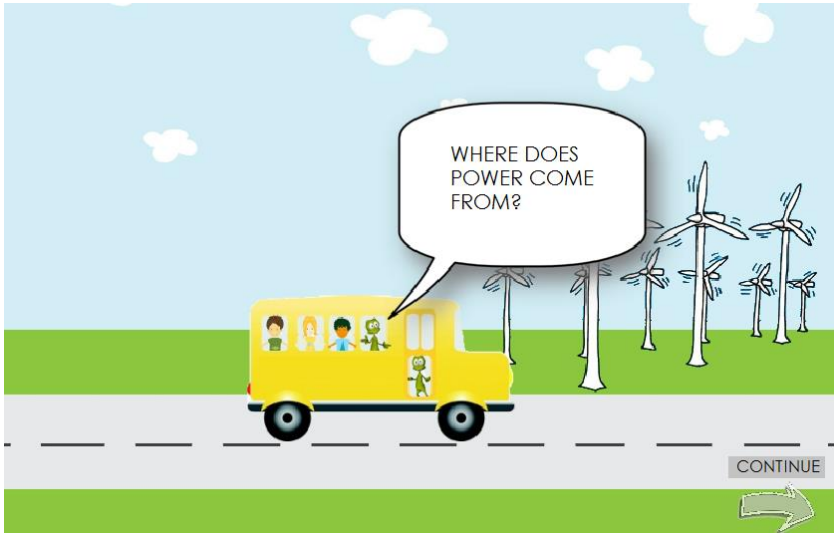


**Figure 4: A print screen of the comic story**

### Post processing

The evaluation sheet with multiple-choice questions was prepared, along with a success evaluation counter. When asked, the students answer the questions and submit the evaluation sheet. The percentage of the objective achieved is estimated, as it is calculated from the summation of the right answers and their degree of difficulty. All sheets are gathered in a database and are applicable for further post-processing. There is a possibility of expressing the objective achievement in diagrams. Most of the post-processing has been done with statistical techniques provided within the open source statistical and mathematical platform Octave (Eaton, 2002).

## RESULTS

Questions were asked of a relatively broad audience (educators, students and external participants), and answers and feedback were gathered to create new questions. The longitudinal nature of our study is aimed at building a strong inquiry for knowledge-based activities at schools.

The following questions and answers may serve as a guide for the further development of digital tools.

### Question 1: How did you understand the short course on renewable energy sources?

In Figure 5, the user is asked how he/she understood the short course on renewable energy sources. It seems that as students and teachers become more familiar with technology and, especially, multimedia techniques, the degree of understanding the subject presented reaches 60% in 2016. The simplicity of the application does not stress students and enhances their learning. However, there exists a standard percentage of 20 to 30% of the participants that continue to show little understanding of the subject in both 2011 and 2016.

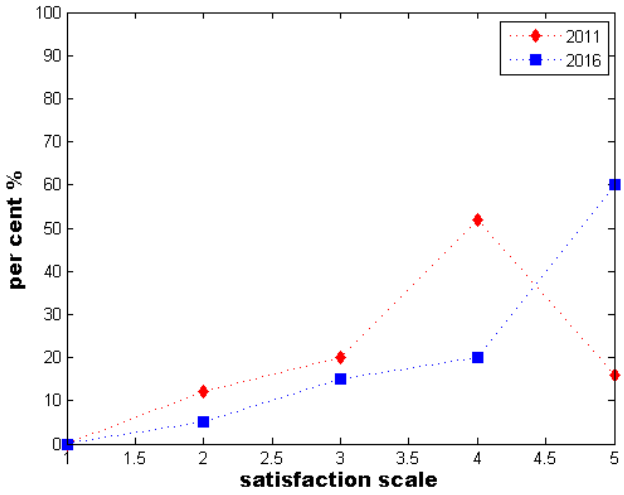


**Figure 5: How did you understand the short course on renewable energy sources? (Dotted lines are key to the eye)**

## Question 2: How do you fancy the idea of teaching/being taught with digital methods?

Participants fancy the idea of teaching/being taught with new digital methods (Figure 6). To support this statement, Ng et al. (2017), note that college students use their smartphones during class time, while completing homework and while studying. A small percentage of students and teachers that do not wish to adopt new methods in learning exists can be considered as a standard finding that does not seem to change throughout the years.

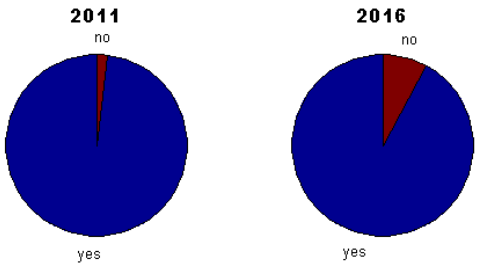


**Figure 6: How do you fancy the idea of teaching/being taught with digital methods?**

**Question 3: Which lessons would you like to have in digital form?**

The answer to this question back in 2011 was limited mostly to Math, History, and Literature, but in 2016, the number of preferred classes increased (Figure 7). Physics and religions are now among the most popular answers. The trend seems to be that, after employing new digital methods in basic classes (e.g., math, history, literature) and getting familiar with them, students are ready to move further, including all classes. In Beavis, Muspratt, and Thompson (2015), in a parallel study on the use of digital games in learning, students' most popular answers for use of digital lessons were for English, Maths, Society/Environment and Technology, while drama, foreign languages and health/physical education were reported as the three subjects least used. But, overall, as students and teachers become more familiar with technology in their everyday life, they seem open to adopt new methods in learning (Rung, Warnker, & Mattheos, 2014).

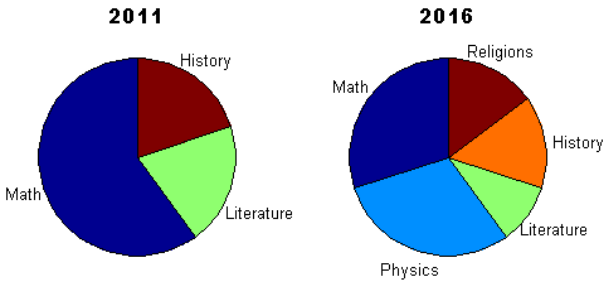


**Figure 7: Which lessons would you like to have in digital form?**

**Question 4: Would you wish to participate in the application using your own avatar?**

An important finding is that the majority of 95 to 97% wish to design his/her own comic and participate actively in the learning process (Figure 8). Although well-known comic characters and super heroes are the first choices for students and teachers when they are asked to build a story, they get enthusiastic when they are prompted to design a character based on their photo and, especially, when this avatar makes the storytelling. Lee (2014) investigates the learning outcome when student avatars are employed in a virtual community and have a specific role in an environment designed to simulate real-world scenarios. They found that the sense of freedom offered in the virtual community enhances interactions between individuals and communities and helps building skills.

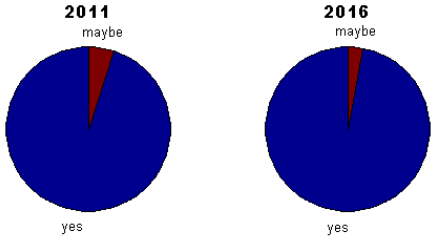


**Figure 8: Would you wish to participate in the application using your own avatar?**

### Question 5: How do you rate the application you just used overall?

Figure 9 shows how participants assess the overall presentation of the course. Although, there is quite a positive view of the method, we observe that positive reactions become less in 2016 compared to 2011. We attribute this behaviour to the fact that the simple 2D graphics of the tool do not attract as much interest in 2016 as they did in 2011. Most of the people nowadays –students and adults– experience advanced digital content on their personal computers, mobile devices and TV, and their criteria have become more demanding. More sophisticated aesthetic features would yield in a higher learning outcome (Won Hur & Suh, 2012).

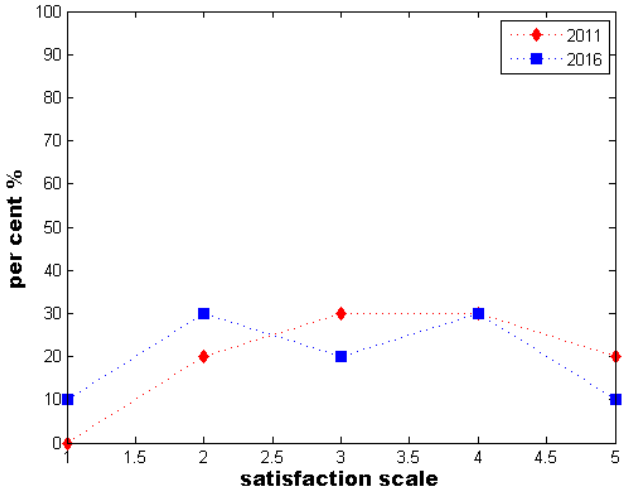


**Figure 9: How do you rate the application you just used overall?**

## DISCUSSION AND CONCLUDING REMARKS

Education in future has to overcome the conservative model of transmission of information from the teacher to the students and move towards the creation of knowledge, following disciplines that engage prior experience with science and technology. Digital storytelling is a promising technique that intersects all levels of education and enriches the educational process. It is currently integrated in the educational system of many countries, providing new results and fruitful discussions. Comics, animations and other technological multimedia representations are also being investigated in parallel in the

classroom. Their impact on students and teachers is, conclusively, positive and work has to be done from the first grades of primary school so that they become common practice and fertilize classical teachings, especially if combined with new electronic devices (Ng et al., 2017; Tindell & Bohlander, 2012).

Studies have investigated digital storytelling, comics, animations, and other techniques as distinct techniques; there is a vacuity in studying the integration all techniques. Furthermore, a comparative study on the application of each technique for the same educational field could be of great interest. For example, an experiment in natural science could be approached by a digital story, a short comic book, or animation. The students would interact with all of these techniques and argue for the preferred method in terms of which one they would be willing to implement, or which one best achieves the educational target. In addition, DS methods in natural sciences, as a distinct region, have rarely been applied and thorough investigation of the method would be of great interest.

Each technique, from another point of view, has been inserted in one educational level, either in primary school, in high schools or universities; although in Di Blas and Paolini (2013) digital storytelling is employed in primary and high schools in parallel in Italian education. A systematic investigation of applying a general platform through all educational levels (primary schools, high schools and universities) would be an asset. Issues to be resolved are whether students, in every educational level, prefer to participate in authoring comic strip books or multimedia digital stories. However, the students can be authors only if they wish to be; in lessons in which they may feel hesitant they can just be observers until they start to fancy them. Teachers and students work together in order to derive the pedagogical implementation and group work is encouraged so that, even weak students can participate.

Our investigation has shown that students, teachers and other individuals fancy the idea of actively participating in the design of the learning process, as long as it stimulates their interest and their aesthetic and technological criteria have become more demanding. Education professionals should keep pace with this.

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# Bilingual use of translanguaging: Chinese student satisfaction in a transnational Business degree in English

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*Studies of student satisfaction in higher education settings highlight the contribution of teaching, learning and assessment, institutional status, and the personal factors of self-efficacy, preparedness, and sense of community. Transnational partnership research has identified that similar student satisfaction factors are experienced by mainland Chinese students enrolled in English-language degrees. However, there are certain challenges related to foreign language skill development, intercultural exchange, and lack of local contextualization. This paper provides insights into the interplay among satisfaction factors in the transnational context of an Australian-China higher education partnership for Chinese students studying a Business degree in their home country. In addition, the paper highlights the value added to the student experience by the expeditious use of local Chinese exemplars and translanguaging across the two languages to explain the more complex concepts presented in the course content. In so doing, the paper sheds some light on the role of local, native speaking staff in the teaching and learning process and their contribution to student satisfaction, a known retention benefit to higher education institutions.*

*Keywords: Chinese students; transnational education; satisfaction; translanguaging; bilingual pedagogy*

## INTRODUCTION

Transnational higher education programs in China developed rapidly in the decade of the 2000s as host English-speaking universities arranged international partnerships with interested universities. Transnational education refers to higher degree study programs where students are located in a country other than that in which the awarding institution is based (Wilkins, 2016). Most transnational education programs facilitated by Australian higher education institutions are undertaken through partnership arrangements (TEQSA, 2013, p. 3); there are more formal education partnerships with Chinese universities than with any other country (Marszalek, 2012).

According to Mok and Xu (2008), a key impetus for the growth was the entry of China into the World Trade Organization (WTO) in late 2001. Programs, particularly in Business, flourished in the period 2007–2015. By 2015, there were 1,116 transnational higher education partnerships in China with 64 institutions from 22 countries, 148 of these with Australian institutions (Mok & Han, 2016; Wilkins, 2016).

The growth of such programs has been attributed to the benefits accruing to both the Chinese Government and Chinese higher education, and the host institutions. From the perspective of the Chinese Government, affiliation between Chinese and Western institutions builds Chinese institutional capacity and human capital, enabling the institutions to broaden their program offerings and build prestige and student demand through access to foreign resources and expertise (Yang, 2008, p. 274). Over time, transnational education in China has evolved from an informal and relatively unregulated activity into a more systematic model with increasing layers of oversight (Mok & Han, 2015). Recent regulations include the *Education Blueprint 2020*, released by the Ministry of Education in 2010. A key policy of that document is a drive to increase the internationalization of tertiary programs through partnerships with foreign institutions, encompassing teaching, professional scholarship, and research. Transnational partnership governance is not regulated by the Central Chinese Government, but Chinese higher education institutions are under that authority and, thus, partnerships are indirectly affected (Mok & Han, 2016).

Chinese student motivation for enrolling in transnational programs has been studied. Fang and Wang (2014) investigated motivations underlying Chinese students' choice of a transnational higher education program. Pull factors that drew students towards transnational programs included the benefits of foreign teaching methods and foreign knowledge, improved foreign language skills and cross-cultural communication, better prospects and preparation for studying abroad, and the ability to attain a well-regarded foreign degree or dual Chinese and foreign degree. Push factors that deterred students from the alternative study options related primarily to perceived deficiencies in Chinese programs, such as lack of access to programs or majors of choice, insufficient internationalization, and lack of foreign language development opportunities. Other push factors were barriers to cross-border, on-campus entry into overseas higher education institutions arising from high costs, high language requirements, visa issues, and the hurdles of cultural adjustment. In addition to the pull and push factors mentioned, students enrolled in transnational programs were likely to be studying a dual degree, which was more expensive than gaining a local qualification. These factors also had potential for affecting student satisfaction.

The purpose of this study is to review the benefits to Chinese undergraduate business students of a partnership between an Australian regional university and a Chinese university. Student satisfaction was analysed in terms of personal factors, language, culture and use of Chinese local exemplars in relation to their experiences with the curriculum and their Australian and Chinese teaching staff. We begin with a brief overview of historical and contemporary research on student satisfaction with an emphasis on student experience in transnational education programs in China, and highlight the importance of translanguaging in this context. Details follow by examining key contributors to student satisfaction before presenting and discussing the research findings and drawing conclusions to the study. Important features of satisfaction nominated by students related to the teaching and learning components of the program, in particular the support of bilingual Chinese teachers in China and the communication channels opened by the lecturers for improving the students' levels of comprehension and engagement. Chinese teaching staff contributed to student satisfaction and mitigated Chinese cultural concerns about transnational education. They enhanced the quality of the Australian curriculum through translating and contextualizing course content and other forms of translanguaging. We believe that raising awareness of the Chinese

teachers' use of English and complementary use of Chinese has added another dimension to transnational education research, which Lewis, Jones, and Baker (2012) claimed is "needed to establish when, where, and how translanguaging is a suitable teaching approach" (p. 651).

### Research Questions

Research Question 1: What were the teaching, learning, and personal drivers of Chinese student satisfaction in an undergraduate Business program transnational partnership between an Australian regional university and Chinese tertiary partner?

Research Question 2: What role did the local teaching staff play in using the practice of translanguaging with the students and contextualizing the Australian course content?

## LITERATURE REVIEW

### Overview of student satisfaction studies

Student satisfaction is linked to institutional benefits of higher retention (Roberts & Styron, 2010; Sembiring 2015; Tinto, 1993), improved grades (Bean & Bradley, 1986); positive communication about the institution (Alves & Raposo, 2009), and student loyalty to the institution (Webb & Jagun, 1997). More generally, institutions gauge students' overall experience in much the same way as if the students are customers of that institution (Wilkins & Balakrishnan, 2013). University experience is understood to include elements such as experience with teaching staff and the study curriculum, administrative advisory staff and support, facilities and virtual resources, institutional reputation, and social integration within the learning environment (Gibson, 2010). Factors identified as significant in the analysis of satisfaction contribute either positively or negatively to student experience.

Additional elements have been identified among Business students. These include the acquisition of real-world skills, prospects for successful employment and their expectations of academic performance (Debnath, Kumar, Shankar, & Roy, 2005; Douglas, Douglas, & Barnes, 2006; Elliot & Shin, 2002; Mai, 2005; Rapert, Smith, Velliquette, & Garretson, 2004) as well as their perceptions of the grading system in the transnational context (Mok & Han, 2016; Xu, 2005 as cited in Yang, 2008). Of the various factors mentioned, Gibson (2010) found that the academic factors of teaching and the wider curriculum were generally the most important. These studies were mainly based on quantitative evidence from surveys and did not extend to levels of satisfaction expressed by students in focus group discussions. Nor did they explore satisfaction associated with studying and functioning in a foreign additional language—factors pertinent to this study—where teaching involved a partnership between bilingual local teachers and native English-speaking staff of the host university.

### Transnational education programs in China: Learning and teaching experience

Transnational education in China has unique features and hence it is relevant to overview contemporary studies of student and teacher experience in those programs. Mok and Xu (2008) reported on the learning experiences of Chinese students from three institutions in Hangzhou city enrolled in transnational higher education programs with an Australian higher education provider. Students were generally satisfied with the teaching methods employed and course assessments, although most students raised concerns about their

English proficiency and related communication issues. Previously, Xu (2005, as cited in Yang, 2008) had reported similar satisfaction findings for Chinese students enrolled in transnational programs. He reported positive satisfaction with the teaching approach, competency of foreign staff, and assessment methods, but also noted communication difficulties with foreign staff arising from lack of English competency.

When addressing challenges faced by Australian staff relating to course design and teaching, some authors have highlighted distinguishing characteristics of mainland Chinese students. Course writers and examiners should be cognizant, therefore, of students' learning style preferences. Debowski (2003) noted the tendency of Chinese students to defer to those with higher status in the student group and that this impacted negatively on the quality of classroom interactions. On a related theme, Heffernan, Morrison, Basu, and Sweeney (2010) investigated cultural and learning style differences between Australian and mainland Chinese business students to facilitate the development of more tailored education products in transnational settings. While both cohorts were found to be visual learners, Chinese students were more sensory or fact-oriented, and commonly global or holistic rather than sequential learners. Recommended strategies to improve learning outcomes for Chinese students included using visual aids, emphasizing linkages between theory and real-world practice, presenting the overall session goals at the commencement of each class, and implementing group activities and guest presentations that emphasized contextualized learning. Yang and Yao (2007) raised concerns about a lack of contextualization in the form of local Chinese content exemplars in transnational programs. They expressed the view that the influence of Western social values on the teaching pedagogy and the curriculum had resulted in a certain disconnection of students from Chinese culture, society, and politics.

Australian academics recognize the need to contextualize learning in their courses, yet the international contexts are often not integral to a course. Dunn and Wallace (2006) surveyed 61 Australian academics from nine universities involved in transnational education programs based on their experiences travelling overseas to conduct teaching schools. Reflecting concerns about lack of contextualization in the learning pedagogy, several academics indicated that they had added local examples and case studies to the course materials for the students in the partnerships. They recognized that the expertise of local teachers in the partnerships was an important resource often overlooked by the Australian universities. Debowski (2003) had previously established that a gap existed in the literature. While many Australian academics had acted as mentors to foreign teachers to facilitate the teaching in transnational programs, little was known about the contribution that local Chinese speaking teachers were making to the teaching and learning process and its impact on overall student experience. In a subsequent study, the researcher re-stated her claim that greater awareness of the skill sets of local Chinese staff was needed (Debowski, 2005). Leask (2004, p. 3) confirmed that the local teachers' contextual knowledge should be given more prominence in the teaching arrangement, given that they acted as "cultural mediator and translator". This paper addresses that apparent gap in teaching practice research.

Additional factors in the satisfaction equation for students, therefore, include issues of language and culture, lack of local contextualization in course content and the contribution made by local, bilingual teaching staff. The studies reported here highlight elements of the teaching partnership and the need for greater awareness and recognition of local staff. However, they do not explore the value-adding contribution of the

phenomenon of "translanguaging" (Cummins, 2008) by local teachers who engaged in "the process of making meaning, shaping experiences, gaining understanding and knowledge through the use of two languages" (Baker, 2011, p. 288) thereby advancing student learning outcomes and satisfaction. Translanguaging pedagogies promote metacognition, build deeper thinking, and enable emergent bilingual students to engage with texts that are typically considered beyond their instructional capacity (Garcia & Wei, 2014, as cited in Lubliner and Grisham, 2017, p. xii). Teachers' use of translanguaging can assist students to construct meaning and build their understanding of course content.

## METHODOLOGY

This study assessed levels of satisfaction, including the translanguaging environment, of Chinese students in their higher education journey.

The research method targeted undergraduate student satisfaction factors of the Australian university Chinese students enrolled in its transnational undergraduate Business degree at Zhejiang University City College (ZUCC) in Hang Zhou, China. Three instruments were utilized: (i) Questionnaire; (ii) Focus groups comprising a subset of respondents to the questionnaire; (iii) Written follow-up open-ended surveys of the Chinese business teachers and students at ZUCC. The Human Research Ethics Committee of the Australian university granted approval for surveys, interviews, and focus groups (Ethics approval number: H07REA686).

### Data collection

#### Surveys

A questionnaire was completed by approximately 100 ZUCC students in each of two consecutive years, enabling the gathering of quantitative data relating to demographics and students' experience of the transnational program. The survey design was informed by known universal influences on university student experience. The surveys were conducted in-class under the supervision of ZUCC teaching staff. Completion of the questionnaire was entirely voluntary and anonymous.

#### Focus groups

Two focus groups were established at the same time as administration of the survey. They were designed to access the views, experiences, and attitudes of the student participants to enrich the data captured by the questionnaire. Further exploration exposed finer detail of the various factors that increased or reduced satisfaction (for example, Levers, 2006; Morgan & Krueger, 1993). Each group was managed by a single moderator who covered the same topics in the same sequence. Focus group participants consisted of students with varied academic performance histories as identified by ZUCC transnational program staff. The selection of an equal balance by gender of nine volunteer participants per group was consistent with the view that between six and 12 participants is ideal (Baumgartner, Strong, & Hensley, 2002; Johnson & Christensen, 2004).

Participants were generally active in the discussions and exhibited a degree of confidence in their responses. Members who did not express an opinion on an issue in the focus group discussion were assumed to have agreed with the majority viewpoint (Harding, 2013, p. 150). Discussions continued until, from the moderator's perspective, data saturation

had been reached, both within and across the two groups (Onwuegbuzie, Dickinson, Leech, & Zoran, 2009; Samure & Given, 2008).

### Follow-up surveys

Based on the original survey and focus groups, two open-ended surveys were developed by the researchers to capture further reflections on the teaching and learning in the transnational program, one for the ZUCC students and one for the ZUCC teachers. The teacher survey document, consisting of six open-ended questions, was emailed to three volunteers from among the ZUCC Chinese teachers. It explored elements of the teaching experience and teaching practice that had been raised by the focus-group participants.

A member of the ZUCC teaching staff facilitated the follow-up student surveys comprising two open-ended questions that explored learning approaches and cultural adjustment. The eight participating students were selected on the basis of varied academic performance histories and gender balance as identified by the overseeing teaching staff member.

## Data analysis

### Surveys

Associations between how Chinese undergraduate Business students rated various aspects of their undergraduate experience and their overall satisfaction with the institution were evaluated using Spearman's Rho (ρ) Correlation technique. Sixty-one statements probing students' experience of teaching practice and their personal learning attributes were rated from Strongly Disagree to Strongly Agree on a nine-point Likert Scale and were correlated against student satisfaction in response to, "Overall I am satisfied with my experience at university". Statements that correlated positively with overall satisfaction at the 99% level of significance in both survey years were identified as positive factors that increased satisfaction.

The questions on elements of teaching practice did not distinguish between Australian and ZUCC teaching staff. However, the design of the courses and their assessment were the responsibility of the Australian course examiners. Assessment feedback and course delivery were primarily the responsibility of ZUCC teaching staff.

### Focus groups

Focus group discussions were recorded, transcribed to provide rigour (Onwuegbuzie et al., 2009) and analysed through the application of classical content analysis (Morgan, 1997). Transcripts were overviewed to establish key categories of concern to the students. The general categories were then grouped into sub-categories and coded. The frequency of response per category and sub-category were calculated for the combined groups (see Table 1), as discussed by Kidd and Parshall (2000). We viewed the frequency of independent mention of a sub-category as evidence of its relevance to the participants (Parker et al., 2012). Participant responses were summarized by sub-category and are reported below.

### Follow-up surveys

ZUCC teacher and student responses to open-ended questions were summarized and are reported in the results below.

## RESULTS

The results take the form of analysis of the demographics of the participants, initial survey and focus group findings, and summary of responses of the local Chinese teachers and their students to the follow-up open questions.

### Demographics

ZUCC students who participated in the surveys formed a relatively homogeneous group between the ages of 20 and 25 years and studying full-time (see Table 1). Most were living on campus in the college dormitories. The majority of respondents were female and not engaged in paid employment.

**Table 1. ZUCC survey respondents by age group, enrolment type and gender**

| Category | Sub-category | Year 1 | Year 2 |
|---|---|---|---|
| Age group | | | |
| | < 20 | 1 | 1 |
| | 20–25 | 88 | 97 |
| | 26–35 | 10 | 1 |
| | >35 | 1 | 1 |
| | Total | 100 | 101 |
| Enrolment | | | |
| | Full-time | 88.6% | 93.2 % |
| | Part-time | 11.4% | 6.8 % |
| Gender | | | |
| | Male | 41% | 18.4 % |
| | Female | 59% | 81.6 % |

Eighteen students were selected from the Survey 1 respondents to participate in focus groups. Group 1 consisted of nine participants: four females and five males, and Group 2 consisted of nine students: five females and four males. Follow-up surveys involved three ZUCC staff (2 males and 1 female), and eight ZUCC students (4 males and 4 females).

### Survey and focus group findings

Analysis of the focus group transcripts revealed a high degree of inter-group consistency on issues of student concern, so the findings were combined to produce frequencies of response as indicated in Table 2.

Two broad satisfaction categories, namely teaching practice factors and personal learning factors emerged from the survey and focus group findings. All factors identified as significant were positively correlated with satisfaction. No negative factors were found at the 95% level of significance or higher.

**Table 2. Focus group analysis: Top 10 sub-categories ranked by frequency**

| Rank | Sub-Category | Frequency |
|---|---|---|
| 1 | Assessment. | 66 |
| 2 | Language difficulties in course materials or assessments. | 55 |
| 3 | Course content issues, main source of help to answer questions, level of satisfaction with help given. | 51 |

| | | |
|---|---|---|
| 4 | Suggested improvements to the host Australian university program. | 47 |
| 5 | Belief about the role of course examiner and role of local teachers. | 37 |
| 6 | Positive attributes of the Australian university program. | 34 |
| 7 | Culture. | 32 |
| 8 | Dissatisfaction with the host Australian university. | 31 |
| 9 | Value of teaching schools with course examiner. | 30 |
| 10 | Perceived benefits in the decision to enrol in a transnational program with the Australian university. | 20 |

**Teaching practice factors**

Analysis of survey responses indicated that teaching approach and the interactions between students and teachers, complemented by the quality of teaching rooms, contributed positively to overall student satisfaction. Efforts to make courses interesting and relevant $(\rho_{y_1;y_2} = 0.545; 0.487)$, such as through an enthusiastic approach to teaching $(\rho_{y_1;y_2} = 0.466; 0.365)$, the use of real-world examples$(\rho_{y_1;y_2} = 0.363; 0.355)$, and clarity of both explanations $(\rho_{y_1;y_2} = 0.449; 0.496)$ and expectations $(\rho_{y_1;y_2} = 0.546; 0.517)$, were important elements of teaching practice. Helpful assessment feedback $(\rho_{y_1;y_2} = 0.550; 0.335)$ also contributed to satisfaction, a likely benefit of which was improved performance in future assessments.

Consultation activities, particularly where teachers demonstrated the qualities of availability $(\rho_{y_1;y_2} = 0.527; 0.383)$, helpfulness $(\rho_{y_1;y_2} = 0.555; 0.537)$, approachability $(\rho_{y_1;y_2} = 0.539; 0.359)$, sensitivity $(\rho_{y_1;y_2} = 0.532; 0.347)$, understanding $(\rho_{y_1;y_2} = 0.375; 0.349)$, and a flexible, accommodating approach to varying student needs $(\rho_{y_1;y_2} = 0.537; 0.406)$, also contributed positively to student satisfaction. Satisfaction was also facilitated by the belief that teaching rooms provided a high-quality learning environment $(\rho_{y_1;y_2} = 0.421; 0.580)$.

Focus group interactions highlighted assessment performance as a priority because the students functioned within a highly competitive educational and employment environment. They generally favoured time-flexible forms of assessment, such as online quizzes that assessed textbook knowledge, because they were rewarded for revising course content progressively. Students expressed a desire for greater guidance on structuring assignment answers. Consistent with the literature (for example, Debnath et al., 2005), they preferred assignment tasks to be oriented towards authentic real-world skills, thereby creating a more tangible sense of accomplishment.

A key feature of classroom pedagogy was the bilingual nature of teaching at ZUCC. Students found it helpful that ZUCC teachers explained complex topics in Chinese, thereby lowering language and cultural barriers to learning. Students also recognized the value-adding contribution of Chinese staff, who added local exemplars to contextualize the course content, and requested that the local content be included in the assessable content by the Australian course examiners. In comparing Australian and local courses, students noted that Chinese courses tended to emphasize memorization, while Australian courses tended to emphasize understanding and application.

Students valued the teaching schools conducted by the Australian course examiners, particularly where the examiner fostered participation. Students believed that visits helped to bridge the cultural gap and build understanding despite many feeling reticent to ask questions and participate in classes when it was culturally more acceptable for them to sit quietly and listen. While this is consistent with the reflections of Debowski (2003), follow-up surveys of ZUCC teachers indicated that students became more confident as the transnational program matured.

Intermittent communication between Australian course examiners and the ZUCC teachers was one area of concern, particularly about the requirements of individual assessment items such as assignments and exams, since it resulted in a disconnection between the effort they made and the grade they received. Students also expressed concern that foreign universities and both foreign and Chinese employers did not recognize the qualitative distinction between grades earned in Chinese courses and those awarded by the Australian university.

**Personal learning factors**

Personal factors that correlated positively with satisfaction included a sense of belonging to the university $(\rho_{y_1;y_2} = 0.602; 0.461)$, possessing clear career goals $(\rho_{y_1;y_2} = 0.314; 0.415)$, regularly seeking advice from teachers $(\rho_{y_1;y_2} = 0.326; 0.270)$, and qualities that contributed to self-efficacy. Such qualities included being hardworking $(\rho_{y_1;y_2} = 0.495; 0.397)$, having confidence in their academic ability $(\rho_{y_1;y_2} = 0.488; 0.302)$, being enrolled in their degree of choice $(\rho_{y_1;y_2} = 0.434; 0.555)$, finding their courses interesting $(\rho_{y_1;y_2} = 0.563; 0.463)$, enjoying the intellectual challenge posed by their studies $(\rho_{y_1;y_2} = 0.481; 0.548)$, recognising the importance of high quality analytical skills $(\rho_{y_1;y_2} = 0.259; 0.381)$, and participating in classroom discussions $(\rho_{y_1;y_2} = 0.389; 0.509)$. Satisfaction was also linked to the belief that courses built upon previous knowledge $(\rho_{y_1;y_2} = 0.312; 0.395)$, reflecting scaffolding in the degree structure.

Satisfied students also enjoyed social interaction $(\rho_{y_1;y_2} = 0.401; 0.289)$ and had a positive view toward intercultural dialogue $(\rho_{y_1;y_2} = 0.343; 0.346)$, intercultural group work $(\rho_{y_1;y_2} = 0.374; 0.295)$, and the sensitivity they experienced from students of other cultures $(\rho_{y_1;y_2} = 0.418; 0.263)$, consistent with the findings of Fang and Wang (2014). This level of satisfaction was evident in their participation in intercultural exchanges in the online activities and study forums. Some focus group members reported using the course forums as a means of building community with foreign students and acquiring and experiencing new ways of thinking.

Focus group responses revealed that the desire to improve their English language skills was a key motivation for ZUCC students to undertake the transnational program. These findings are consistent with the results of the Fang and Wang (2014) study. Participants identified that their English language skills had improved throughout the dual degree and this improvement brought benefits, including improved course results, improved performance on English language proficiency tests required for studying abroad, and improved employment prospects. Such benefits contributed to their satisfaction. However, focus group participants nominated language issues as the primary cause of early dropouts from the Australian university courses. English difficulties were generally of most concern in the first semester of study when the likelihood of dropping courses was higher than in later semesters.

**Follow-up survey of ZUCC teachers: Summary of findings.**

In the view of the ZUCC teachers, a number of factors contributed to their students' success in the program, which were similar to the satisfaction factors identified in the original survey. The transnational program students generally worked harder and more consistently than students in the single degree ZUCC courses, since they were studying in English as their second language and had a higher course load in the dual degree. They paid closer attention to teachers' in-class instructions and put more time into post-class review of materials. In addition, students undertaking the transnational program were more likely to aim at undertaking postgraduate studies, either abroad or in China, and were more explicitly goal-oriented.

ZUCC teachers adjusted their content delivery over time. They delivered lectures more slowly, placed greater emphasis on explaining the content—contextualizing content through the inclusion of Chinese examples (Figure 1), a feature highlighted previously by Heffernan et al. (2010). They augmented lecture PowerPoints with Chinese language explanations (Figure 2) and used Chinese language PowerPoints to explain complex topics while encouraging students to ask and answer questions in English. Some teachers provided a template for students to use, which enabled them to undertake assignment tasks in a coherent way. Further, they emphasized to students that understanding and applying concepts was more important than memorization.

The ZUCC teachers varied in their complementary use of English and Chinese in the classroom. One teacher used English language PowerPoints but spoke predominantly in Chinese. Another stated key theories or concepts in English, then provided an in-depth explanation in Chinese. In the view of one ZUCC teacher, their translanguaging approach helped students to adapt more quickly to the English language materials and this was particularly beneficial to those students who intended to undertake further studies abroad.

> I use English to state theorems and theories, and I use Chinese to explain the specific interpretation. Bilingual teaching is very useful for many students who intend to study in English speaking countries, since it makes them to adapt to foreign study very quickly (Ren, ZUCC teacher, Personal Communication, 13 April 2016).

Concerning higher order thinking, one ZUCC teacher believed that students' critical thinking improved as they took higher level, more specialized courses. One example of critical thinking was demonstrated by the students expressing interest in analysing the impact of Chinese firms on the economy, such as Yu'E Bao, an investment service offered by China's leading online payments provider, Alipay ("Ye", ZUCC teacher, Personal Communication, 1 August 2016*)*. Another ZUCC teacher noted that students in the transnational program became noticeably more competent at presentations and more willing to provide views and feedback in the classroom than those undertaking only ZUCC courses. A change in classroom culture had taken place, in contrast to student reports from the focus groups. This is a welcome reflection given Debowski's (2003) observation that Chinese students tended to defer to those with higher status in the student group and this impacted negatively on the quality of classroom interactions.

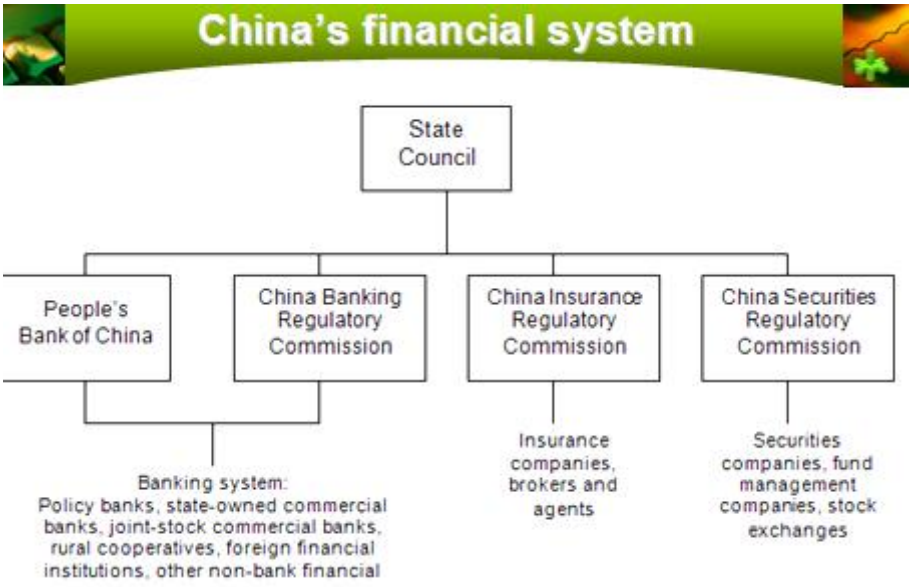


**Figure 1. Contextualized content example**
Source: *'Ye', ZUCC teacher, Personal Communication, May 9, 2016*


**Figure 2. Example of augmented lecture PowerPoint**
Source: *'Ye' ZUCC teacher, Personal Communication, May 9, 2016*. (translation validated by a Chinese staff member of the Australian university)

### Follow-up survey of ZUCC students: Summary of findings

Students in the transnational program employed several strategies or learning approaches including:

- Previewing materials before class;
- Taking notes during class to complement supplied learning materials;
- Listening carefully during class, facilitated by good English listening skills;
- Asking face-to-face questions of teacher during or after class;
- Reviewing slides, and other materials post-class and emailing local teachers with questions arising from this review;
- Attending review sessions (tutorials) conducted by ZUCC teachers;
- Summarizing the main themes of each topic;
- Consulting Chinese language textbooks;
- Developing a vocabulary of professional terms;
- Analysing the marking criteria prior to beginning assessment items; and

- Using progressive assessment items (quizzes and assignment) as a resource for the final exam.

Students outlined several positive and negative elements of the cultural adjustments made for the transnational program. Positive elements included:

- Improved spoken English proficiency;
- Improved written English skills;
- Expanded English vocabulary of professional commerce terms, particularly helpful since English is the default global language of commerce;
- Increased professional knowledge arising from increased course load required by the dual degree;
- Emphasis on understanding concepts using examples rather than memorization aided comprehension;
- Broadened viewpoint and acquisition of international knowledge, including knowledge about Australia;
- Exposure to new perspectives on various issues;
- Opportunity to interact with other cultures; and
- Smoothed adjustment process due to similarities between the learning environments in the Chinese and Australian universities.

> Chinese education emphasis[es] memorising mechanically and I always recite things while it is exactly [the] opposite when learning "*transnational university"* courses for their aim is to understand them [sic], therefore, more examples are involved in the course (ZUCC student 'F', personal communication, April 1, 2016).

Negative elements included:

- Difficulties structuring essays due to major differences between Chinese and English language structure;
- Higher time cost of courses because English was their second language; and
- Higher time cost of courses because of additional time required to adjust to differences in culture and values.

Other cultural adjustments noted by the students were:

- Adjusting to differences between Australian and Chinese accounting standards;
- Adjusting to differences in business culture and work ethic—one student noted surprise that working overtime was less highly regarded in Australia than in China; and
- Adjusting study method by reducing focus on the text book and increasing focus on other course materials.

## DISCUSSION OF FINDINGS

Survey and focus group findings highlighted teaching and learning factors that contributed to the Chinese students' satisfaction with the transnational program. Statistically significant factors rated as benefits included: good teaching and assessment practice within a well-scaffolded degree structure, real-world relevance of materials, and desirable teacher attributes in addition to elements of student self-efficacy, work ethic, and goal orientation. A critical element appeared to be successful assessment outcomes positioning the students well for success in a competitive job market and in future

postgraduate study opportunities. In addition, students benefited from the inter-cultural experiences afforded by the Australian course content and exemplars, interactions with foreign students via online course forums and valued dialogue with their course examiners during teaching school visits, all of which facilitated a broadening of perspective and satisfaction with the transnational experience.

Studying in English presented both opportunities and challenges. Students claimed they had improved their written and spoken English and professional vocabulary, yet they still faced the challenges of comprehension of course materials. English language difficulties were reported to be a cause of attrition from the program in the first year and students believed they were disadvantaged by a certain cultural dissonance between Chinese and Australian grading systems.

ZUCC staff varied in their classroom pedagogy, but all surveyed used a blend of English and Chinese in their oral presentations and delivery of class materials. This bilingual blend helped students to navigate the difficult transition in undertaking an English-language degree. The teachers' use of translanguaging through a culturally sensitive understanding of the language needs of the students may also have assisted students to develop English language skills, enabling their cognitive development and increased confidence to speak in class. In addition, augmenting content with Chinese exemplars helped to reduce the disconnection between course materials and the social, political, and business context within which the students functioned. Programs such as this, with a translanguaging approach to pedagogy have the capacity to promote the academic achievement of emergent bilingual students, providing them with exposure to comprehensible language (Harklau, 1999, as cited in Lubliner & Grisham, 2017, p. xii).

## CONCLUSION

Good teaching practice of the host university and student qualities of self-efficacy and goal orientation combined to produce a positive experience for Chinese students in this transnational program. At the same time, language difficulties, cultural adjustment, and the contextual challenges of studying in a foreign language negatively impacted satisfaction for some students. We contend that the previously understated translanguaging ability of local teachers was a value-adding component of this transnational program. The Chinese teachers made a significant contribution to student satisfaction by mitigating those negative language and cultural factors. The teachers' bilingual presentation of the course materials, augmented by local contextual examples and translations of complex topics, contributed to student satisfaction. Translanguaging potentially enhanced the students' language development and their use of professional vocabulary in English, facilitating improved assessment outcomes, employment, and postgraduate prospects. The results, therefore, reinforce the notion that bilingual teaching by Chinese staff contributes to the quality of student satisfaction in transnational programs.

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# What more can we learn from PISA tests? A comparative analysis of the long-term dynamics of Israeli international educational achievements

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*One of the most prominent comparative international tests in recent years is conducted by the Programme for International Student Assessment (PISA), which is used to assess students' literacy in Reading Comprehension, Mathematics, and Science. Israel has taken part in these assessments from its inception, and since then it has been gradually dropping in the world ranking. By 2015, Israeli students were located between 37–40 out of 70 countries, down from 31–33 in 2000. Using Israel's data in the PISA cycles, we aim to offer an alternative comparative view of these international results, based on measures of self-change. These measures show a consistent and significant system-wide improvement of the Israeli educational performance in all three PISA tests since 2000. Not only does this contrast with its downward trend in the international ranking, which stems from the inclusion of more countries, but the rate of change was consistently positive over time and surpassed that of its European and American counterparts. Indeed, these measures of change show a general growth of about 23 points over 15 years, which reflects a consistent improvement of 6 to 9 points in average per cycle since the 2000 results. In light of these findings, the paper discusses the significance of measurements of change in comparative international tests.*

*Keywords: PISA, International tests, Education, Achievements, Measurement of change*

## INTRODUCTION

### Programme for International Student Assessment (PISA)

It is common to distinguish between two main types of student assessment: large-scale assessment and classroom assessment. Large-scale assessments test a large number of students and are a means of obtaining information about the relationship between various educational achievements and the factors that may explain them (the Committee for Measurement and Evaluation in Education, 2005), such as curriculums, pedagogies, as

well as the quality and functioning of an educational system. In Israel, large-scale assessments of achievements are carried out through two main systems: Matriculation (*Bagrut*) and a system of measures of efficiency and school growth (*Meitzav*). The latter constitutes a system of social-educational indices designed to provide an up-to-date picture of the educational system at its various levels, based on national assessments in Native Language, Mathematics, English, and Science. At the international level, large-scale assessments are carried out using comparative achievement tests such as that implemented by the Programme for International Student Assessment (PISA).

Such comparative international tests have been introduced in the world since the 1960s. Since the 1990s, the use of these tests has expanded greatly with the support of international organizations such as UNESCO, the World Bank, and the Organization for Economic Co-operation and Development (OECD). The results of these tests attract considerable public attention among countries, with most of the them dissatisfied with their international position even when located at the top of the world ranking (Atkin & Black, 1997; Blass, 2016). One of the most prominent comparative international tests since the early 2000s is the PISA, which is used to assess academic literacy in reading comprehension, Mathematics, and Science among pupils in the 15-year-old age group. The objective of PISA assessments is to test students' ability to use their literacy skills to understand and interpret a variety of written materials they will likely meet during their lives, their ability to apply their mathematical knowledge to tackle various real-world math-based problems, and their ability to use their scientific knowledge to comprehend and interpret diverse scientific situations and challenges (Turner & Adams, 2006). According to the OECD (2016), the PISA tests are designed to serve as an indicator of "students' capacity to apply knowledge and skills in key subjects, and to analyse, reason and communicate effectively as they identify, interpret and solve problems in a variety of situations" (p. 15) (this refers to the concept of literacy). PISA also indicates the relevance of these students' capabilities for lifelong learning, "as (it) asks students to report on their motivation to learn, their beliefs about themselves and their learning strategies."

PISA tests have differed in terms of their disciplinary focus in each cycle, with the emphasis on reading literacy in 2000, Mathematics in 2003, Science literacy in 2006, Reading Comprehension in 2000, and Mathematics again in 2012 (Blass, 2016). The sample includes at least 150 schools in each country, with a minimum of 5,250 students randomly sampled. In addition to the disciplinary literacy tested by PISA tests, students are asked to provide demographic information, educational and professional preferences, personal characteristics, and characteristics of their family environment (Turner & Adams, 2006).

Performance on PISA tests are standardized, with an overall mean score of 500 points, and a standard deviation of 100 points. Between 2000 and 2015, the leading OECD countries with the highest scores in these tests were alternately: Finland, Canada, Chinese Taipei, Japan, China (Shanghai), Singapore, Australia, and New Zealand (not necessarily in this order), and sometimes also European countries such as Estonia, the Netherlands, and Liechtenstein. PISA average scores of the three disciplines in these levels over the years approximately ranged from 530 to 555 points, between one-third and one-half of the standard deviation above the average. Some countries have been observed to reach even higher, such as China's (Shanghai) 2012 average score exceeding 580. There generally appears to be a correlation between achievements in the three disciplines tested

among these leading countries, that is they tend to achieve relatively high scores in all three subjects.

Dozens of countries have begun to evaluate their students' abilities based on their achievements in comparative international tests, based on the assumption that a high ranking in these tests reflects a better future national ability to compete in the global market (Rochex, 2006). As a result, the popularity of these exams has begun rising in recent decades. The results are widely covered in the media, with attempts to analyse and explain the relative achievements in each country (Feniger, Livneh, & Yogev, 2012). Most explanations offered by the experts around the world regarding students' performance were directly attributed to the quality of the countries' educational system in terms of structure and policy (Feniger & Lefstein, 2014). After its students were ranked below the OECD average in 2000, Germany enacted policy to implement comprehensive reforms in the education system, including the establishment of an educational standards monitoring mechanism. The United States (US0 uses state-level standardized testing, and also has national testing regimes. Following these examples, Israel introduced a policy of setting standards, including evaluation measures for scholastic achievement, school efficiency, and growth (*Meitzav*) (Yogev, Livneh, & Pniger, 2009).

However, studies published in recent years suggest another way of examining and understanding the international variance in student achievement on the PISA tests. Feniger and Shavit (2011), for example, showed that the relatively high birth rate in Israel can explain most of the discrepancies between the Israeli students' achievements and the PISA's international mean scores in 2000 and 2006. This high birth rate is reflected in the formation of larger families and crowded classes, which, in turn, affect children's educational achievements. Moreover, studies show that high birth rates are associated with a decline in cognitive development and educational achievement first and foremost through family size, beyond the relative reduction in national student investment *per se*. This is due to the tendency for children to receive a smaller share of family resources in families with more siblings, including less parental attention and involvement in the child's education (Blake, 1989). Further, an additional analysis of the PISA scores from 2000, conducted in Israel in 2002, showed that students' achievements in Israel are almost entirely predictable by two macroeconomic variables: Gross Domestic Product per capita (GDP) and demographics, notably the proportion of young population ($R^2$~0.80, Feniger et al., 2012). The researchers pointed out that the economic and demographic elements of the countries largely dictate their success in the PISA tests, rather than the investment in education and the quality of the educational system. Yogev et al. (2009) concluded in this context that:

> The low ranking of the Israeli students among the other countries does not reflect such poor achievements in the education system that justify a public panic response. It is not at all clear whether these findings should lead to the conclusion that there is a decline in academic achievement in Israel. There may be such a decline, and there may not. In any case, our findings indicate that the results of the international tests do not provide sufficient grounds for the claim regarding the Israeli decline in achievements. (p. 349)

Economic and demographic factors can similarly predict PISA scores among other countries (Feniger et al., 2012), questioning its validity as an indicator of the educational abilities of students around the world and the quality of their national education systems. For example, the PISA reports from 2000 revealed a close connection between mothers'

education and students' achievements in all three PISA's disciplines, which reflects more than half a standard deviation gap compared with those students whose mothers did not complete high school (Anderson, Lin, Treagust, Ross, & Yore, 2007).

## Assessing learners' achievements by measurement of change

A standard way to evaluate performance is based on equivalent comparison of the performance level between individuals or groups. This approach is common and widely accepted for the purpose of comparing achievements among individuals and groups in the fields of sports, education, and more. In the field of education, this approach is used by decision-makers to classify and scale learners according to their achievements on a seemingly equivalent performance scale. On a national or international scale, these assessments are used to compare the achievements of many students in order to identify patterns of strength and weakness in teaching methods, pedagogies, and educational systems, as well as to assess accomplishment of educational goals (National Research Council, 2003). Nevertheless, assessing achievement through an inter-learner comparison at a given time point is not sufficiently sensitive to the dynamics of individual learners' change relative to their previous state (e.g., when assessing the effectiveness of new curriculums) and hence does not necessarily reflect trends of improvement. In some respects, measuring individual change over time is the most important issue in educational measurement, since the main purpose of teaching is to induce learning, and the essence of this change can only be measured by comparing the performance of individuals and groups with their own abilities before and after the learning (Coleman, 1975). The dynamics of the school's achievements, or the educational system at the macro level, argues Coleman, should be the main measure of its educational quality.

A traditional measurement of change deals with two main approaches. One focuses on individual changes over time and addresses the question of whether there has been an improvement in performance, whether the improvement is stable or gradual, and whether its trend straightens at the end of a certain period. The second approach deals with the question of groups' differences in nature and rate of change, so that one group improves faster than the other. The first method usually precedes the second method, since it is initially necessary to identify the individual's pattern of change prior to evaluating whether one pattern of change is systematically different from that of another individual (Willet, 1994). Barrett and Alexander (1989) offer three operational definitions of measures or criteria for change: 1) long-term changes in the average level of individual or group performance; 2) changes in the correlation of validity metrics over time; and 3) changes over time in rankings of individuals within a group. It has been suggested in recent decades that educational measurement of individual change should shift from a two-wave measurement (e.g., pre-post testing) to the measurement of continuous and multiple growth cycles (Bock, 1976; Willett, 1994). Measuring the continuous multiple change in the average level of performance will be adopted in this study for testing Israeli self-change in PISA tests overtime.

## Evaluation of international achievements in PISA tests in terms of self-change

A brief review of the PISA results of the various countries over the years since its onset indicates the dominant way of evaluating the students' level and the educational quality in each participant country. Thus, an international comparison of the nations' average score in each discipline is used by public opinion and educational policy makers to rate

their national educational system relative to the rest of the participating countries. Along with this traditional comparative view of international achievements in education, there is also an equally important perspective for evaluating achievements on PISA tests. This refers to the trend of change (improvement or deterioration) that has occurred in the countries' achievements during the past decade-and-a-half of PISA tests, beyond their achievements *per se* in each cycle. This perspective has attracted much less interest and attention among experts and stakeholders. Even prior to the PISA era, Willett (1989) warned about the tendency of experts in educational measurement to assess the efficiency of different pedagogies by comparing learners' educational performance at a single point in time rather than in terms of self-growth over time. Within-subject change in PISA scores over time—that is in this context within each country—may not only provide forecasts of countries' achievements in these tests for the upcoming years but may also constitute an important measure of the effectiveness of the educational processes at both the micro- and the macro-levels (school and national education, respectively). The scant consideration given to this perspective in assessing international achievements shows a surprising trend regarding Israel, whose students were among the top ten countries in the world in terms of improvement in international comparative tests over time, including in the PISA (Blass, 2016).

In light of the substantial difficulties involved in educational comparison of students from different nationalities and cultures, as pointed out by various experts in the past (Bonnet, 2002; Goldstien, 2004; Romainville, 2002), evaluating the PISA results via the measures of self-change in achievements over time (i.e., improvement or decline against country's own past scores) seems fundamental. International comparative tests that purport to be educationally equivalent (in a sense of measuring differences in performance related to identical educational skills and contexts) must give more consideration to dynamics of self-change in achievement over time. This is because indicators of change within nation as measured by PISA results are a type of standardized measure whose values allow for a more equal comparison between the performance of students of different cultures and languages.

The differences between the Israeli scores and the other countries' scores in Mathematics and Science over the years has led to the conclusion that the educational state of the Israeli student has worsened due to the deteriorating condition of the Israeli educational system in recent decades (e.g., Ben-David, 2003; 2010). However, the decline of the Israeli students in the international ranking in PISA tests does not necessarily reflect diminished educational capabilities compared to their previous performance. In line with Yogev and colleagues (2009), we aim to introduce here a method of examining the performance of an educational system in terms of self-change as a function of time in PISA tests. While PISA provides a trend analysis in the primary analyses they publish after each round of (i.e., it reports the change relative to the last cycle), this paper endeavours to generate a timeseries analysis of long-term PISA data, resulting in a quantified comparable score of the countries' changes over time. Considering the relatively low attention given to this perspective on countries' achievements in international tests, the current study strives to provide a complementary analysis of the change in PISA results relative to these countries over all the years.

By studying the case of Israel, the perspective presented here may yield new insights regarding the educational state of various countries and national groups from an international perspective.

### The study's objectives

The study intends to show that from 2000 to 2015, not only did the achievements of Israeli students in the three evaluated educational disciplines not decrease, they, indeed, improved consistently and significantly, even though their international ranking among the OECD countries declined. In this paper, we will attempt to implement the orientations of a self-change measurement discussed above in order to assess Israel's individual improvement in the PISA tests over the years and compare them with that of several selected countries. Examination of Israeli students' achievements by using measures of change will show a consistent trend of improvement in all three disciplines. Considering the relatively low attention given to this perspective on countries' achievements in international tests, the current study strives to provide a complete analysis of the change in PISA results relative to these countries over all the years.

In order to analyse Israel's case in terms of the measurement of change, the following countries were selected for comparison purposes: Finland (FL), the United States (US), Britain (UK), and France (FR). Being a world leader in the PISA international ranking, Finland has been viewed by many in Israel (IL) and globally for a decade-and-a-half as a focus of interest and a role model educational system. UK, FR, and the US (in order) are currently located at centre or above of the PISA international ranking, with at least two cycles ranked in the top 15. These countries were chosen due to similarities in ethnic ratios between demographic majorities and major minorities. Also, their economics (GDP) are similar (though the US is higher), with comparable unemployment (except for FR). Interestingly, UK and FR are much less diverse than the US, which is similar to IL. Finally, these countries have similar liberal and advanced democratic forms of government. FL was included here for its position as "education powerhouse," even though its investment in education is relatively higher and it has a homogenic culture.

Despite cultural and educational similarities with IL, these countries are still located significantly higher in the international rankings of PISA tests, despite the Israeli effort to imitate other nations' policies, such as "No Student Left Behind" in the US (Yogev et al., 2009). Nevertheless, these three countries have experienced an ever-downward trend, while IL has been continuously improving. The aim of this study in this context is to express the differences between these countries in terms of self-change measurements and to show how this view of achievements reverses the hierarchical structure between them.

## METHODS

### Variables

The results of PISA tests in the three literacy disciplines: Reading, Mathematics, and Science, between 2000 and 2015 (see Table 1 for details), as reported for the following five countries: FL, IL, US, UK, and FR.

### Data source

This work is based on the data of the achievements recorded for the five selected countries participating in the PISA evaluations, as published in publicly available online material provided by the OECD) 2003, 2005, 2007, 2010, 2014, 2016). With respect to each

country, the national average scores for each PISA test in Science, Mathematics, and Reading Comprehension were isolated and analysed comparatively.

## RESULTS

### Distribution and ranking of international PISA scores (2000–2015) from a conventional perspective

Here we review the achievements of the five discussed countries in PISA tests over the past two decades, providing their published international rankings over the years. In order to establish a concise comparative perspective, this report will focus on three-time points: 2000, 2009, 2015. As mentioned earlier, PISA scores are standardized to a mean score of 500 and standard deviation of 100.

Table 1 shows the scores and rankings of the five countries in three PISA tests from 2000 to 2015. An overview of the PISA test data in its first cycle (2000) shows that FL ranked at the highest place among the five countries and shared one of the five top places of the total world ranking in all three disciplines. The US is ranked between the 15th to the 20th place in this PISA cycle, with better achievements in Science. Ultimately, the two European countries, UK and FR, achieved higher rankings than their US counterpart and are ranked between 5-8 (UK) and 11–13 (FR), while IL is ranked far behind, between the 31st and 33th places. In 2003, FL preserves its international ranking in the top five, the other three countries lose approximately three to five places from their former international ranking in PISA tests, and IL did not take part in this cycle.

**Table 1: Achievements data of the 5 selected countries in PISA tests between 2000–2015**

| **Country** | **Test** | **(Ranking) & score** | | | | | |
|---|---|---|---|---|---|---|---|
| Participating countries (number) | | 2000 *41* | 2003 *41* | 2006 *56* | 2009 *64* | 2012 *65* | 2015 *70* |
| 1. FL | Reading | (1) 546 | (1) 543 | (2) 547 | (3) 536 | (6) 524 | (4) 526 |
| | Math | (5) 536 | (2) 548 | (2) 548 | (5) 541 | (12) 519 | (5) 532 |
| | Science | (4) 538 | (1) 548 | (1) 563 | (2) 554 | (5) 545 | (5) 531 |
| 2. UK | Reading | (8) 523 | (12) 507 | (18) 495 | (25) 494 | (23) 499 | (21) 498 |
| | Math | (9) 529 | (17) 510 | (25) 495 | (28) 492 | (26) 494 | (15) 507 |
| | Science | (5) 532 | (12) 518 | (14) 515 | (16) 514 | (21) 514 | (15) 509 |
| 3. FR | Reading | (15) 505 | (18) 496 | (23) 488 | (22) 496 | (21) 505 | (20) 499 |
| | Math | (11) 517 | (13) 519 | (24) 496 | (22) 497 | (25) 495 | (27) 492 |
| | Science | (13) 500 | (14) 511 | (25) 495 | (27) 498 | (26) 499 | (27) 495 |
| 4. US | Reading | (16) 504 | (19) 495 | (18) 495 | (17) 500 | (24) 498 | (24) 497 |
| | Math | (20) 493 | (30) 477 | (36) 474 | (31) 487 | (36) 481 | (25) 494 |
| | Science | (15) 499 | (24) 491 | (29) 489 | (23) 502 | (28) 497 | (25) 496 |
| 5. IL | Reading | (30) 452 | - | (40) 439 | (37) 474 | (34) 486 | (37) 479 |
| | Math | (31) 433 | - | (41) 442 | (42) 447 | (41) 466 | (40) 470 |
| | Science | (33) 434 | - | (38) 454 | (42) 455 | (41) 470 | (40) 467 |

The following will focus on the main trends that have emerged since 2009, given the sharp international increase in participation in PISA tests, from 30 to 64 countries. In the 2009 cycle, FL retains the 2nd–5th positions, the US ranges from 17-31 (preference to Reading), while UK and FR rank 16-25 (preference to Reading) and 22–27 (preference to Math and Science), respectively. IL is located far behind, between the 37th and 42th places (preference for Reading). Against the background of the increasing number of participating countries, it can be seen that all of the countries discussed here (apart from FL, as mentioned) lost their starting position in the global rankings. It should be noted that the ranking gaps between the three disciplines consistently expanded for all these countries, concomitant with the expansion of the included nations.

An overview of the last cycle of PISA tests so far, the last of which was conducted in 2015, shows again that only FL maintained its position in the top five places in the league table. The US occupies the 24th-25th places, narrowing the ranking gaps between the disciplines, but apart from Mathematics it does not achieve significant progress. UK (15–21) and FR (20–27) achieve a general improvement of several places each, while

It is unclear what can be learned from the trends reviewed so far regarding the dynamics in the achievements of the five countries discussed here. In general, it appears that since 2003 the five countries have occupied a consistent range of rankings in the international PISA tests (subject to changes in the number of participating countries), with a consistent tendency since 2000 to lose a few places in each cycle, except for FL, and to stabilize or improve in the last cycle. Table 1 generally ranks the five countries according to their mean scores on PISA tests and their place in the overall international rankings over the years. Accordingly, FL is ranked first among the top five, followed by UK, FR, and, finally, the US and IL with the lowest scores, with most of them below the OECD average.

Examining the achievements data among the five countries discussed here essentially shows that the general hierarchy is also evident at the individual level in each of the subjects (Figure 1). With respect to all three disciplines, FL leads the five with above-average scores over the years, and IL is in last place with below-average achievements. Regarding Mathematics, UK and FR appear to be in the second place with above-average achievements in most years, while the US is lower with below-average scores. With respect to science, UK is in second place with above-average achievements in most years, while FR and the US are approaching the international average (with a slight advantage for FR). As for Reading, finally, it can be seen that most of the three middle-table countries achieve quite similar achievements in this field over the years, with scores that approaching the international average.

The conventional international comparison of the achievements of the five countries over the years offers a clear hierarchy for at least three of the five countries in terms of the educational level of their students in the three disciplines. Accordingly, FL's achievements in the PISA tests clearly reflect the highest average performance in Reading, Mathematics, and Science literacy among the five, followed by the European countries, the US, and, finally, IL.

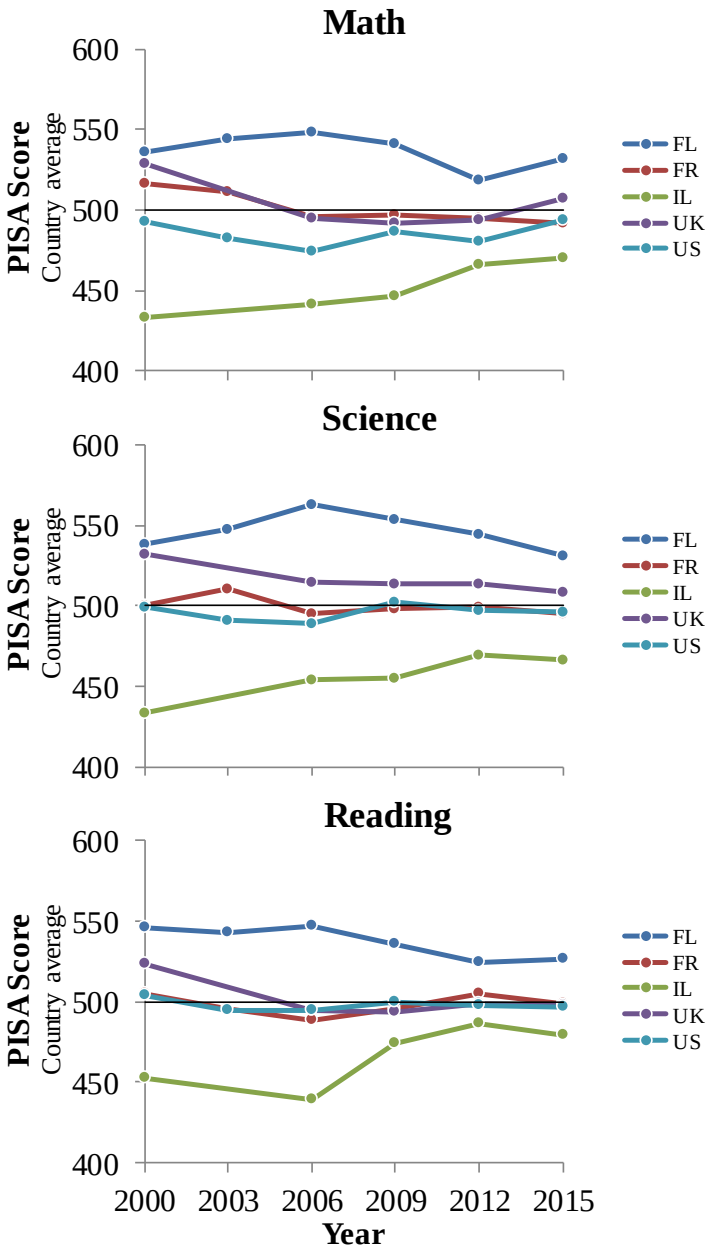


**Figure 1: Description of the 5 selected countries in PISA tests between the years 2000–2015**

### Evaluating the results of PISA tests using measurements of change

Here we will examine the achievements of the five selected countries in terms of change (i.e., increase or decrease) in each PISA cycle compared with previous achievements, in order to rank the countries according to an overall change-over-year index, that describes the trend (positive / negative) and its size.

Regarding the five countries discussed here, the differences in achievement relative to the 2000 results in the three PISA tests are calculated. A positive change of a given country's achievements is described in points relative to the starting point of the PISA test in 2000. Figure 2 shows that IL is the only country among the five that shows a constant positive upward trend since 2000 in each discipline, except for Reading in 2006. Not only is the Israeli trend of change generally positive (i.e., the scores' differences between a given

year and 2000 is larger than zero), but also the increment relative to 2000 for the most part grows from one cycle to the following. Following the recent PISA tests, the Israeli improvement trend grew to approximately 40 points, an improvement of approximately 8% in the three subjects compared with its starting point in 2000. Finland is the only country, except IL, whose achievements over the years in Mathematics and Science are partially in an upward trend relative to 2000, although as of 2006 the rate of its improvement between the following years steadily decreased. This downward trend is consistent, showing FL's achievements in Mathematics and Science in recent PISA tests falling below their levels in 2000.

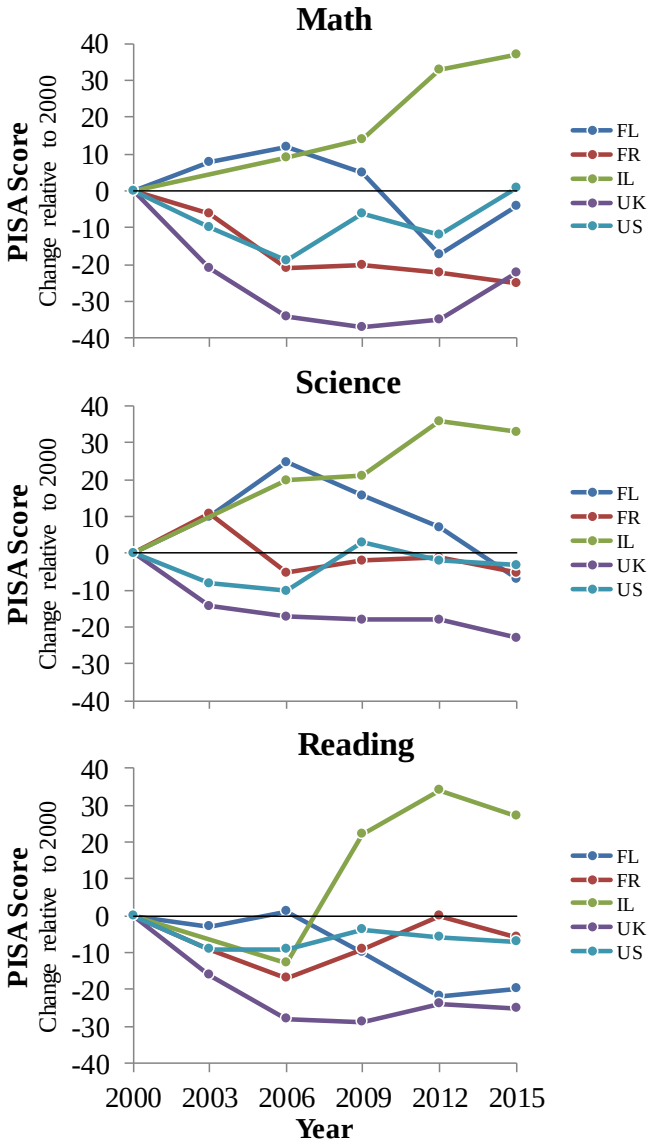


**Figure 2: Description of the scores' change in the achievements of the 5 selected countries in the PISA 3 tests between 2000 and 2015**

A downward trend is observed for the other countries, in achievements in all PISA tests since 2000 (as reflected in the scores below the midline in Figure 2), with this trend remaining relatively stable and not deteriorating. The US, for example, has maintained a

stable gap of a few points over the years, compared with its 2000 achievements in the three disciplines. UK, which began with fairly high achievements in 2000, experienced a sharp decline in all the disciplines in 2006, but this decline stabilized with no further deterioration. A similar trend emerges for FR regarding Reading and Mathematics, but since 2006 its achievements in sciences are not substantially lower than in 2000.

In order to weigh the dynamics of achievements of the five discussed countries into a general measure of change, we calculated the mean changes in each PISA discipline compared to the 2000 achievements as a reference point (i.e., the mean difference between the results in 2000 and the results in all subsequent cycles). Generally, the higher this index is, the more positive trend of change it reflects in each discipline compared to PISA's starting point in 2000. The change in the three disciplines was also calculated. An overall average between-discipline was computed:

$$\bar{D} = \sum_{i=2}^{6} \frac{(X_i - X_{2000})}{N - 1}$$

where *i* is the index of PISA cycles from its second cycle to its sixth cycle and X is the standardized PISA score in the year 2000. This ranks the five countries by the size of their overall change over years

**Table 2: Description of the measures of change in terms of the mean differences ($\bar{D}$) between PISA scores in 2000 and the following cycles**

| Country | Math | Sciences | Reading | Overall change ($\bar{\bar{D}}$) |
|---|---|---|---|---|
| 1. IL | +23.25 | +27.5 | +17.5 | 22.83 |
| 2. FL | +0.8 | +10.2 | -10.8 | 0.06 |
| 3. US | -7.0 | -10.4 | -4.0 | -7.13 |
| 4. FR | -18.8 | -0.4 | -8.2 | -9.13 |
| 5. UK | -29.4 | -18.0 | -24.4 | -23.9 |

Table 2 shows that the only two countries with an overall positive change are IL and FL. These measures reflect a general trend of improvement relative to these countries' scores in the PISA tests over the years. With respect to FL, the data indicate an average decrease of 11 points in the Reading scores, compared with its starting point achievement in PISA 2000. In contrast, IL accomplished a larger improvement in comparison with FL in all three subjects, with an average gain of nearly 23 points in its achievements over the years (compared with the starting point in 2000). This trend is reflected in Figure 2, (see L), which is mostly above the midline referring to the three disciplines. In contrast, the overall measure of change is negative for the other countries, reflecting an average decline in all three disciplines compared to their starting point in 2000. The stronger negative trend was recorded for UK, which opened the PISA tests with relatively high achievements in all three disciplines (see Table 1) and subsequently deteriorated from this point.

The measure of change in Table 2 properly reflects the dynamics in achievements relative to 2000 as a starting point, but it is not sensitive to the improvement that may occur between two consecutive cycles afterwards. Thus, for example, the improvement trends between two consecutive cycles of UK after 2000 are not reflected in this index, since their achievements in these years are lower than those achieved in 2000. To overcome this problem, the consecutive change measure (CCM) was calculated:

$$\bar{D} = \sum_{i=1}^{5} \frac{(X_{i+1} - X_i)}{N - 1}$$

where *i* is Index of PISA cycles from its first cycle to its fifth cycle; X is the standardized PISA score in cycle *i*. This averages the gaps between the various PISA cycles over the years in all its three disciplines. Table 3 displays these results and ranks them according to the general consecutive change measure, which constitutes a general mean change beyond a discipline. In order to test the significance of the linear change over years (as described by the trends in Figure 1), we calculated the slopes values of the five cycles' scores for each discipline and considered them in relation to the CCM.

**Table 3: Description of the measures of change in terms of the mean differences ($\bar{D}$) between PISA scores in cycle *i* and the consecutive cycles**

| Country | Math | Sciences | Reading | Overall change ($\bar{\bar{D}}$) |
|---|---|---|---|---|
| 1. Israel | +9.25 | +8.25 | +6.75 | +8.08 |
| 2. Finland | -0.8 | +2.6 | -4.0 | -0.73 |
| 3. USA | +0.2 | -2.6 | -1.4 | -1.26 |
| 4. France | -5.0 | -1.0 | -1.2 | -2.4 |
| 5. Britain | -4.4 | -4.6 | -5.0 | -4.6 |

According to the CCM (Table 3), FL manifests a slight negative trend of change whose slope is significant for Reading (β= -0.50, p<.05), while, in general, the countries' ranking does not change in order. The overall CCM index, which reflects the mean change in scores of the following PISA cycles for the three disciplines, places IL at the top of the table, with a higher positive change per year. The Israeli students' achievements improved by more than eight points on average between cycles. The individual measures of change of the Israeli students in Mathematics and scientific literacy were both positive and supported by significant slope of improvement (β=0.34, p<.05 and β=0.39, p<.05, respectively), while in Reading Comprehension they also reached a consistent improvement of approximately seven points per PISA cycle. The positive Israeli changes discussed here are also reflected in the upward trend of the graphs appearing in Figure 2. On the other hand, the other three countries all show negative trends of change between subsequent PISA cycles, with a consistent decline ranging from 1.3 to 4.5 points on average. In this regard, UK showed the strongest negative trend among them, with its students' achievements in all three disciplines dropping by an average of more than four points, reflecting a significant score decline in Science (β= -0.62, p<.05) and Reading (β= -0.37, p<.10). FR's CCM decrease in Mathematics is also supported by a significant negative slope (β= -0.41, p<.05).

In conclusion, two different measures of self-change of PISA scores in its three disciplines place IL at the highest level among the five countries selected for our discussion, even though its ranking in terms of achievements was the lowest since the first cycle. The fact that IL has more room to improve from a lower place than its comparative countries should be taken into account, but probably would not be sufficient for interpreting its advantage on the two measures of change. This is because the achievements of our three middle-table countries since 2003 are themselves approaching

the general average (500 with the standard deviation of 100), and occasionally even lower in all three PISA disciplines (see Table 1).

## DISCUSSION

In this article, we suggest a method of comparing the international achievements in PISA tests, based on descriptive measures of change. This approach is based on the orientation of measuring the within-subject change of an individual nation's performance in terms of improvement and growth over time (Barrett & Alexander, 1989; Willet, 1994). Being ranked significantly lower than its counterparts in the international rankings, and generally lower than the global average, IL is a classic case study to illustrate the paper's thesis on the importance of measuring the change in international achievement in PISA tests. IL's performance began in 2000 with achievements below the standard. Though it improved since then (especially in 2009), IL's mean performance is still below the average and remains essentially at that level in 2012 and 2015. However, the main finding that emerges from this analysis using the measures of change proposed here (change over time), is that IL has achieved a positive and consistent improvement in all subjects from 2000 to the present, which is preferable to the trend of change recorded for its European and US peers included in our analysis.

These results, alongside the indexes deriving from the regular comparison between the countries' mean scores on PISA's tests, illustrate the importance of both ways of evaluating countries' educational performance through international tests. This is because one of these indicators alone may, in some circumstance, portray an incomplete and even misleading view of the countries' educational performance over time. The measures of change relative to the achievements of the Israeli students showed an average increase of 6–9 points per PISA cycle over the years, which reflects a statistically significant improvement in Mathematics and Science. As far as IL is concerned, this represents a total improvement of about 23 points in PISA mean scores for the three disciplines of literacy, compared with its achievements in 2000 (i.e., an average improvement of more than 20 points since the starting point, which remains stable over time). Against the background of these indices, the data on the change in achievements of all the other countries was negative, indicating a consistent deterioration in achievements between PISA cycles (which, for three counties was partially supported by a statistically significant trend), and generally compared to the first PISA cycle in 2000. In terms of these proposed measures of change, IL and FL are ranked first among the five countries, while UK is in last place. It should be noted, however, that IL's priority in terms of overall change scores, can be accounted for by the fact that countries who achieve at a high level of performance (i.e., FL) are limited in the extent to which their students are able to improve (a phenomenon known as a ceiling effect), while students from low (or lower) achieving countries have much more room for improvement.

Diverging from the prevailing view of the deteriorating state of IL's educational system (Ben-David, 2003; 2010; Blass, 2016), a conclusion that may be drawn from these findings is that the educational level of Israeli students, as evaluated by the PISA international achievements tests, improved from its first round in 2000 in at least two disciplines, with this improvement remaining stable over the last two decades (i.e., the mean scores of the Israeli students in all the following rounds since 2000 are higher than the starting point). Although it is unclear how significant this improvement is, it is entirely

clear from the findings that there has been no decline in the Israeli students' level as reported by the mean PISA score. Although, IL's performance remains well below the average of participating countries, these results (comparing the international PISA exams throughout all six cycles) reinforce the doubt raised by some researchers regarding the possibility that the Israeli education is constantly declining (Yogev et al., 2009; Feniger et al., 2012). It seems that not only have Israeli students not lost their literacy knowledge in the fields of Science, Math, and Language, but it has also improved considerably over time.

The current work focused deliberately on characterizing this trend of change in descriptive quantitative terms, while analysis of its educational significance is the subject of a separate examination due to its complexity. To the best of our knowledge, a 10-points increase (IL's average increase in Mathematics between PISA cycles) should be considered a significant change within the three years that separate each PISA exam cycle, so that in a cumulative view, this trend amounts to an improvement of 40 points since 2000, which is slightly less than half a standard deviation. Indeed, IL has already been recognized as one of the leading countries in the world in terms of improvement in the international tests (Blass, 2016), although, to our knowledge, this has not yet been analysed throughout the whole cycles. Assuming this, IL's improvement is indeed significant. We suggest, here, that the system of measures of efficiency and school growth (*Meitzav*) introduced by the Israeli educational system in 2002 (right after IL's first participation in the PISA international educational tests in 2000), had something to do with the Israeli students' consistent increase in the performance on the international PISA tests. The Israeli *Meitzav* is a national large-scale assessment which, like PISA, also tests students' performance in the three fundamental disciplines (i.e., Native Language, Mathematics, and Science and Technology). It was introduced as part of a growing worldwide education trend of evaluation to support learning and to increase the accountability of schools and the education system as a whole for teaching and learning.

How can this positive trend of change manifested by the Israeli achievements over the years be reconciled with the fact that its position in the international ranking has declined significantly throughout this period? Thus, for example, between 2000 and 2006, IL achieved nine points increase in Mathematics but dropped ten places in the world rankings. In 2009, the Israeli average in this test grew by five points compared to the previous cycle. However, IL continued to fall one place in the international ranking. Similarly, in Science, the Israeli students improved their achievements by an average of 20 points between 2000 and 2006 but dropped in the world ranking by five places, to the 38th place. Finally, in 2015, IL occupied the 37th-40th ranking, following a significant increase in all subjects since 2006. The main reason for this contradiction between the two trends may be the fact that over the years there has been an appreciable and steady increase in the number of participating countries. It should be noted that the sample size has nearly doubled since 2000, with 15 countries added in 2006 and another eight in 2009. This has, in effect, misrepresented the Israeli improvement in all disciplines and not expressed it in the world rankings. With accurate data in this context shown in Table 1, needless to say, the results achieved by the Israeli students in the last PISA cycle in all three disciplines would place them higher in the international ranking relative to the original 41 countries that participated in 2000.

It is necessary to acknowledge the limitations of international comparisons. In this context, Wuttke (2007) points out some of the statistical obstacles, uncertainties, and lack of transparency inherent in the PISA tests. First and foremost, there are very serious problems relating to the translation of items into the various languages of the participating countries. In addition, some countries are not sampled in a representative way, because the sampling method, in some cases, does not allow representation, as exemplified by the case of China. Thus, for example, the lack of participation of weak students or sectors may boost the country's score by about nine points. Finally, there is also the cultural and ethnic diversity among countries expressed in different attitudes of the educational system, parents, and students towards tests in general and the PISA test in particular. Presumably, in this context, students from different countries have a distinct approach to tests that have little impact on their future (Sjoberg, 2007). In Singapore, for example, "be best – teach to the test" is a mantra, and PISA preparation brochures are displayed in supermarkets for a nominal price. While politicians in the West regard the PISA results very seriously, it is very likely that students do not share their ambitions and, therefore, do not invest the effort required to succeed in a long and difficult task without any benefits. Accordingly, the attempt to measure scholastic competence, involving students' motivation to complete the task successfully, may not succeed. We can cautiously suggest that Israel's cultural attitude and set of values towards examinations, in general, and formal education, in particular, does not allow a valid comparison with other countries.

Thus, an international and multicultural comparison of educational achievements requires greater attention to the achievements in terms of the size of self-change over time. For measurements of change that reflect the individual's progress in academic performance, per student or of the national education system, comparison to itself alone can serve as a basis for an equivalent international comparison of achievements. It is plausibly useless to compare Israel to countries with a fundamentally different demographic and cultural character (such as Finland and China), and even to try to imitate them. Interestingly, over the past decade, when much information has been published regarding the international limitations of the PISA tests, there has been no careful reference by international decision-makers regarding its findings. Therefore, interpreting the results of the PISA tests also in terms of a within national-education-system change may yield more solid insights. This approach assumes that the differences between test cycles in each country are marginal, and that the biases are similar, so it can overcome the international variance that makes it difficult to compare the achievements of countries. Yogev and colleagues (2009) wrote in this context that:

> Emphasizing the countries' grades in a hierarchy that attributes importance to the international stratification of countries according to the achievements of their students is detrimental to the international tests and to the public and educational significance given to them ... We warn against the exaggerated public significance given to the international tests, which sometimes leads to focusing on less substantive educational issues. (p. 350)

They have also been able to point out the huge achievement gaps in PISA scores between different sectors of Israeli society. This explains, to a great extent, the fact that despite the consistent improvement, Israel is still below the international average. This issue, too, amplifies the importance of measuring the self-change over time as a basis for assessing international achievements.

Policy makers who seriously examine the trend of improvement that Israeli students have achieved in the international tests over the past two decades, will ask whether in light of the current demographic and educational conditions one can expect more. Israeli researchers noted that a national expectation of a drastic achievement climb in the international tests is not realistic in light of economic, demographic, and cultural direct and indirect variables that predict these achievements (Feniger et al., 2012). Our findings regarding the Israeli self-change in PISA scores over the years support their positions. Although they reflect a consistent upward trend in educational performance measured by the PISA tests, and although this trend is approaching the global average in another decade, this positive pace does not justify the expectations of the Dovrat committee in 2004 to occupy higher PISA rankings in the international tests in a few years. We. Therefore, propose devoting greater public and educational attention in Israel, as well as in other countries around the world, to the analysis of trends focusing on within-national change in the international test achievements. The educational policy should be more focused on these aspects. In this context, refinement of the indicators for assessing the size of change in international educational achievements, while setting clear and achievable improvement goals for the next decade, at the national level and sectorial level, may prevent the misuse of the positive trend in Israel as it approaches the international average score of PISA.

Our findings do not purport to present a rosy picture of the educational situation in Israel, since we cannot ignore the fact that the constant improvement of Israeli students since 2000 still places them below the global average in all PISA tests. However, it should be noted that a apples-to-apples comparison is not possible due to the structure of the Israeli educational system with multiple sub-systems for each minority demographic. The Arab sector drastically underperforms compared to the secular Jewish students, with nearly no attention given to this disparity. Also, the ultra-orthodox community is completely self-contained and does not conform to Western standards of education. Taken together, it is clear that Israel's international ranking compared to China, Finland, or such homogenous countries is of little significance. These findings have global implications and political ramifications, which are not limited to Israel's individual case. As illustrated in this paper, trends of improvement in academic performance reflected in measures of self-change may not match the relative level of performance itself. In line with the position of other researchers (Bonnet, 2002; Feniger et al., 2012, Goldstien, 2004; Husen, 1987; Romainville, 2002), these findings come to warn against the problem of comparing the academic performance of students from different cultural backgrounds and other socio-economic variables. Overly focusing on the countries' average achievements as a measure of international educational comparison may create a false impression regarding the national educational level, instil public panic, and even mislead the educational policy.

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