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## **A Knowledge-led curriculum; pitfalls and possibilities**

**Michael Young**

### **Introduction**

The breakthrough in my thinking about the curriculum came when I tried to answer the question that I now think every generation should ask: ‘what are schools for? (Young, 2012). I was deeply dissatisfied with most of the answers that my discipline, the sociology of education, gave; they were almost invariably trapped by one kind of functionalism or another. Those inspired by Marxism saw the curriculum as an instrument for the reproduction of capitalism’s social inequalities, whereas mainstream functionalists treat it as an instrument (albeit often not a very efficient one) for providing modern economies with the skills and knowledge they are thought to need; neither say much about the curriculum. David Baker (2014) provides an excellent critique of both.

Encouragingly, thinking about the curriculum is beginning to break out of this trap and to focus on the curriculum itself. This comes not only from the sociology of education, Moore (Moore (2009) and Young and Muller (Young and Muller, 2017) among others, but from head teachers (Roberts, 2014) (Knight, 2018), subject leaders and teacher educators (see the contribution from Christine Counsell in *Impact*, September 2018). In other words, this fresh thinking about the curriculum is coming from curriculum leaders reflecting on their experience of schools. They have recognised, to paraphrase Bill Clinton, that ‘it’s the knowledge, stupid’. After all, what else could schools be for if it was not to provide access to knowledge that children would not have if they were forced to rely, as most were prior to the 19th century, on their families, communities and workplaces?

Unsurprisingly, the question of knowledge in the curriculum turns out to be far from straightforward and not all head teachers and MAT multi academy trust) CEOs are as wise as Carolyn Roberts (2014), Christine Counsell and Oli Knight (2018). Many who endorse the importance of a knowledge-rich curriculum are seduced by the good intentions of ED Hirsch and his lists of ‘what every child should know’ (Hirsch, 2004). They interpret this as meaning ‘get the content right and all will be OK’ and, as a result, the vital and difficult role of teachers in what David Lambert calls ‘curriculum making’ (Roberts, 2014) gets lost and teachers become little more than transmitters of knowledge. This has a number of consequences.

One is that the importance of knowledge is increasingly dominated by political priorities (Gibb, 2017). Gibb (and Gove before him), uses the issue of knowledge primarily as basis for blaming the left-wing ‘education community’. They have extended this critique into policy by adding knowledge content to examination syllabuses in the hope that this will lead to higher levels of performance. Predictably, this has added

pressure on schools, their teachers and pupils to focus more on examination outcomes and less on the pedagogic strategies that might facilitate better access to knowledge; this performance-driven approach is similar to ‘state theory of learning’ that Hugh Lauder (Daniels et al., 2011) described.

Another consequence is the forms of discipline and pedagogy found in growing numbers of free schools and academies adopting a knowledge-led curriculum. They are well described by George Duoblys, himself a teacher in one of these schools.

So does this mean that the rediscovery of ‘access to knowledge for all’ as the primary purpose of schools is little more than a slogan? I sincerely hope not. Improving real educational opportunities for all is always going to be a slow and difficult process because it is not just about what goes on in the classroom but involves changes in society as a whole. On the other hand, the idea of ‘knowledge for all’ and not just ‘for the high achievers’ does offer a quite fresh perspective on the curriculum and the question ‘what are schools for?’

In the second part of this editorial I want to make two suggestions. One is that while the goal of ‘access to knowledge for all’ is important, it must be understood as a vision of the future for schools and not associated with immediate outcomes. While it cannot be adopted like a new marking scheme or a change in the timetable it can lead teachers to think about their role in new ways. The starting assumption of such a vision is that we are all born with a ‘desire for knowledge’, as the psychologist Jacques Lacan put it. At the same time, some children may lose much of this desire by the time they reach secondary or even primary school. However, it does not mean that they are ‘less able’ or non-academic.

It follows that it is important for schools to distinguish between ‘access to knowledge for all’ as a long-term curriculum vision and what can be achieved in the short term. A knowledge-rich curriculum is a theory, in the normative sense; it defines what it is to be a teacher and the purpose of schools. Unless all understand this, whether or not we are classroom teachers, it can become little more than a way of putting all the responsibility for failure of too many pupils on teachers or on what is assumed to be their lack of motivation and aspirations.

### **Why does the way schools are organised matter?**

There are two distinctive features of schools that it is worth thinking about, one external and one internal. Their external feature is that they are separate from the communities where their pupils come from. This is true for every school, whether it is an elite fee-paying school where parents pay for their children to be boarders or a school established to serve a local community. Much educational policy aiming to benefit low-achieving pupils has been based on the assumption that this separation has negative consequences for them and needs to be overcome. However, these boundaries have a purpose; they did not develop arbitrarily. I want to reverse the argument and suggest that the separation of children from their everyday experience is, at least potentially, a condition for them to acquire knowledge beyond that experience. It is, in effect, a fundamental condition for them to acquire new knowledge. This is not to dismiss the everyday experience of pupils; it is a vital resource and needs to be taken account of by all teachers. It is to state

that for a curriculum to rely on the experience of pupils alone limits what they can learn from that experience.

The internal structure of schools refers to the hierarchy between teachers and pupils and the structure of the curriculum, which, as pupils grow older, increasingly takes the form of specialised subjects. Whereas the teacher/pupil hierarchy has parallels in parent/child relationships, the curriculum, which divides teaching and learning into distinct knowledge domains is unique to schools (and other educational institutions). It is this structuring of knowledge independently of the experience of pupils that offers the possibility for pupils to think beyond their experience and enable them, as the sociologist Basil Bernstein put it ‘to think the unthinkable and the not yet thought’ (Bernstein, 2000).

Curricula like the RSA’s Opening Minds, with the best of intentions, have focussed on helping low-achieving pupils by breaking down the boundaries between academic subjects and the knowledge pupils can acquire outside school. However, much research has emphasised is that it is these subject boundaries and the specialisation of knowledge that they are associated with that are a condition for pupils to progress and acquire new knowledge. This is not to deny that many pupils, especially those from disadvantaged homes, feel alienated from the curriculum or that overcoming disaffection will be far more difficult in schools recruiting a high proportion of pupils from disadvantaged communities. The problem is both a curriculum and pedagogic one which some schools adopting a knowledge-rich curriculum are beginning to address, but it is also a political problem that reflects wider social inequalities. It is perhaps best understood as a product of our reluctance to recognise the extent to which pupil failure is a problem of the distribution of resources in society as much as, if not more than, it is a problem of distribution of abilities.

### **High-resource and low-resource curricula**

The government has attempted to break with the assumption that only some pupils can acquire knowledge through academic subjects. They have assumed that the curriculum model associated with the most high-performing schools – selective schools with fee-paying students – can be a model for all schools. However, what the government fails to acknowledge is the curriculum found in public schools like Eton, Winchester and St Pauls (to name three at random) which enable most pupils to gain high grades in 11 or 12 GCSE subjects is a high-resource curriculum. The high level of pupil fees enable such schools to include material resources such as grounds, buildings and equipment, and human resources such as class sizes, specialist subject teachers, and extra-curricular facilities in sports and arts that would be unthinkable in a typical state-funded school. Furthermore, there is the hidden ‘cultural subsidy’ that middle class, fee-paying pupils bring with them.

This is not to dismiss what knowledge-led curriculum schools are trying to do. It is possible that these schools will achieve good or even excellent examination results. However, it is to suggest that unless there is some move to equalise resources, the private school curriculum model is likely to have negative consequences for state-funded schools with far fewer resources. Such schools could be (or already may be) forced to

adopt forms of discipline and pedagogy that bear little relationship to those found in the schools on which their curriculum is modelled.

### **Is there another way?**

The common goal of 'knowledge for all' in all schools undoubtedly represents an important break with the past; however, in its present form it splits the curriculum from its costs, and inequality may even increase, especially when per-school funding is cut. Just think of the costs of basing not only the curriculum model but also the resource model of state schools on the public schools. It is ironic that the idea of an academic curriculum for all, at least up to the age of 16, has arisen from the political right wing, given their ambiguous relationship with the expansion of educational opportunities. In the past, this was often justified by the assumption, hardly mentioned today, that educational inequality is justified by the distribution of abilities.

Why the 'knowledge issue' has arisen only on the political right is not easy to explain; however, it is highlighted by the almost total avoidance of the recent debate about 'a knowledge-rich curriculum' by the Labour Party. It may be a product of two deeper confusions. One is about the unrecognised two faces of formal education's 'conservatism'. Formal education is intrinsically 'conservative', through the process by which one generation passes on what it knows to the next. However, a mistake sometimes made by 'progressive' educationists in particular is to equate this with the conservatism of using education to preserve privileges (such as those of the fee-paying public schools). The other possible cause of progressive educators being seen as almost anti-knowledge is that we have no history of pedagogic theory in England, with the consequence that good teaching is understood as child-centred and an emphasis on knowledge is seen as 'back to Gradgrind'. What this fails to recognise is that the elite (except in unique cases such as Summerhill) never endorse a child-centred approach for their children. As a result, far too many working class children are denied access to the knowledge that the middle class take for granted, and any emphasis on 'knowledge' is easily interpreted as a form of control and not as a source of emancipation – when, of course, it is potentially both. There are signs of new thinking that combines a pedagogy that engages students with a curriculum based on the disciplinary knowledge. This is an important development. However, the gains will be isolated, and even short-lived, unless the political problem of an unequal distribution of resources is addressed.

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## **Philosophic inquiry in the development of leaders and citizens**

**H. Michael Hartoonian**

### **Abstract**

This essay addresses the role of philosophy in the development of citizens and leaders within a democratic institution/society. Philosophical study develops perspectives on, and critiques of, fundamental human values and behaviors and provides the necessary key to unlock the door to virtue. Philosophical study and practice also helps us to stop fragmenting our notions of democracy, making it less likely that investigations and decisions fall into the quicksand of simple-minded answers to complex problems. This essay focuses on: 1) understanding the limits of social inquiry; 2) gaining a better grasp of the fundamental tensions within our democratic values; and 3) finding ways of using philosophy to cultivate virtue through such questions as:

- How do I come to know virtue?
- How should I behave? How should I be governed?
- How should I achieve meaning?<sup>1</sup>

### **The question**

Can people govern themselves? Our confidence in “The People” and in their ability to develop and administer civic justice with some degree of wisdom suggests a belief in an elusive democratic or general enlightenment. Enlightenment, when manifested in the people, is always subtle. It is most often found in the acts of individuals and institutions with: 1) a general knowledge of philosophy; and 2) an appreciation of civic integrity. This must be true in any society that claims a democratic DNA. However, both of these conditions are problematic, because they demand a system of purposeful education called *philosophical thinking*, which places a premium on reason, while diminishing the corroding influence of tribalists. All democratic societies have, and must continue to value, reason (enlightenment), simply because tribalism, with its anti-democratic structures and totalitarian mind-set, (must) rely on dogmas and mind control mechanisms that belie the importance of the individual, and the responsibility of self-government.

Within the discipline of philosophy we define the democratic mind, as opposed to the totalitarian mind, as one that has the ability to hold two conflicting ideas at the same time and still be capable of discussing the qualities of both before making, judging, or administering policy. Within the civic realm, the discourse of most worth is the interesting and on-going reasoned and moral tensions between the public and private

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1 Note: This essay is based on two earlier works of the author: *The idea of America: How values shaped our republic and holds the key to our future.* (2013). Colonial Williamsburg Press; and *Philosophy and enlightenment: The role of epistemology in the education of citizens.* *The Good Society*, 25(2-3), 2016, The Pennsylvania State University Press.

lives of individuals. This is manifested in four democratic value debates: common vs private wealth; unity vs diversity; freedom vs equality; and law vs ethics. Exploring these tensions is at the heart of civic leadership, citizen competence, and defines democracy through philosophic inquiry and debate.

### **Enduring arguments over the four value tensions of democracy**

Debating issues and problems in a rational, intelligent way requires addressing the balance between the four enduring value tensions:

- **Freedom versus equality**

The balance between *freedom* and *equality* is an essential fabric of democracy.

When conventional wisdom favors freedom, resources and money flow into the hands of the few. Left unattended, the imbalance of wealth and power hurts the economy and undermines democracy.

In contrast, when government acts aggressively to redistribute wealth in the name of fairness or economic justice, personal liberty suffers and economic incentives are diminished.

- **Law versus ethics**

We describe a democracy as a nation of *law* but understand that a law may not be just or *ethical*.

The rule of law implies that it is the duty of citizens to abide by laws that provide a sense of security and fairness.

Yet, citizens use (have used) *ethics* to change existing law and advance the causes of liberty and justice.

- **Private wealth versus common wealth**

Free people understand *private wealth* as a driving force behind a nation's economic development.

Yet, investment in the public infrastructure—schools and universities, streets and highways, electric grids, utilities, and even parks, hospitals, libraries, and museums—help private businesses to carry out their work. Maintaining the *common wealth* enhances private wealth but, without thriving industries tax revenues would not be available to adequately support public goods and services. There can be no private wealth without common wealth; and no common wealth without private wealth.

- **Unity versus diversity**

One of the finest achievements of a republic like the United States has been to create a relatively stable political culture made up of different languages, religious traditions, and races. This *diversity* enhances the creativity and progress of the nation.

*Unity* is also a necessary component of the society, but has been a persistent struggle. Typically, new immigrants to America have faced discrimination, distrust, and abuse while occupying the bottom of the nation's job chain. Immigrants also work to improve their status and, in time, contribute distinctive cultural influences that enhance *diversity* and richness. Again, a democracy must understand that the logical extension of diversity is apartheid, while the end of unity is a totalitarian state.

### Elements of civic discourse

Intelligent civic communications require viewing significant social issues through the lens of these enduring value tensions and addressing problems by better balancing the discrepancy between them.

- Productive democratic debate values understanding, compromise, and transformation rather than winning.

Americans, it is said, suffer from a “knowledge deficit” and stand out globally for knowing so little about international geography, history, religion, science, and economics. But this is not the most dangerous ignorance. Perhaps, more important for a democracy or republic, are citizens developing the attitude that they do not have to know what *knowing* really is. That is—how do we come to know anything?

- Democratic dialogue and “knowing” is based on the use of objectivity, evidence, science, and reason as well as the role of a deep understanding of subjectivity and transcendent belief systems, and the conflicts therein.
- Democratic discourse rejects or minimizes opinion, feeling, and irrationality.
- Dialogue and debate based on genuine knowing is the only path to understanding and compromise.

### Imperative of the democratic mind

To participate in civic debates, we must develop and cultivate a distinctive mindset—a democratic mind.

- A democratic mind is capable of debating two conflicting values while noting the assumptions and essential merit of both.
- A democratic mind sees the world from a “both-and” perspective in contrast to “either-or.”

It is tempting for humans to take a more concrete, “black and white,” or “I-it” view of the world and relations, but this ignores the complexity of most issues—and their integrated or nuanced nature.

It is intellectually easier to take an either-or position, and many people do, particularly when it is so convenient in the age of the Internet and mass media that segments markets of ideas. We tend to listen mostly to what and to those with whom we agree. This, however, robs the individual of seeing other perspectives and understanding more deeply. The either-or mindset tends to reinforce one’s biases and prejudices.

A republic, however, requires people to understand that debate is not sustained for the purpose of establishing absolute rights and wrongs; it is a conversation about the relationship among important democratic values. We know, however, that perception, worldview, and bias play an important role in the way people deal with facts and opinions. Perception allows people to see and hear best those bits of information that fit into their view of how the world works. This tendency is dangerous to democracy as it closes individual minds and encourages group-think.

### **The role of philosophical thinking in keeping people and markets free**

As we consider the value tensions noted earlier, it becomes clear that engaging in any kind of civic discourse demands acuity in philosophy. Concepts such as freedom, ethics, law, or justice, as well as reason and logic demand a grasp of ideas that are not found in nature. That is, these motive concepts cannot be understood from our narrow, everyday observational judgements. We can never debate or come to reasonable policy decisions if we are unable to absorb and deliberate these fundamental values upon which a republic and free market depend.

Consider the following propositions:

The expanse of freedom that a people enjoy (life, liberty, and the pursuit of happiness) is dependent upon ethical decisions and moral behavior. You cannot delegate an ethical decision, and you cannot be moral alone. The three values of life, liberty, and happiness are mutually supportive. That is, all three are necessary within any understanding of classical liberalism. Life has little meaning without freedom, and freedom is an illusion without happiness. Not simply personal happiness, but happiness defined as an ethical and material substructure of culture where citizens find meaning in working to make their family, firm, and community better. Not better off—but better. An ethical family, firm, and larger community make individuals more secure, prosperous, and happy.

### **The democratic mind and criticism**

Traveling through the democratic landscape without philosophy as your guide, is awkward and dangerous. Criticism, the necessary skill within the concept of the democratic mind, yields a more comprehensive understanding of reality. It presupposes a philosophical worldview that lends direction and predisposes methodology in the pursuit of certain goals and relationships between the individual (and family) and the state. Criticism is concerned with judgments about self, education, existence, values, and thinking itself. Civic criticism, by definition, means clear communication among citizens; that is, criticism is only possible when citizens respect standards of clarity, truth, and human dignity. Empathic listening is as important as the right of free speech. But criticism goes beyond clarity to embrace the concept of courage. This concept was expressed, within an educational setting, quite succinctly by Henry Giroux (1984):

*The notion of being able to think critically on the basis of informed judgment, and to develop a respect for democratic forms of self- and social-empowerment represent the basis for organizing schools around the principle of critical literacy and civic courage. In other words, schools should be seen as institutions that prepare people for democracy. They should promote the acquisition of a critical culture and social practices that allow students and others to view society with an analytical eye. (p. 190)*

This is the beginning of the notion I would call “loving critic.”

Civic criticism carries at least three interrelated behaviors. First, the citizen must value, observe, and absorb the social culture of the state or society so as to bring in as complete a picture as possible, or a more true impression of the situation. (We should note the contradictory nature of the phrase *true impression*.) This calls for the ability to

take in information, impressions, and arguments, and conceptualize the setting within temporal and spatial contexts, complete with explicit as well as subtle issues, promises, and problems. Next, the citizen must be able to react to the setting; that is, she must be a countervailing force, or at least, an asker of questions. These questions should probe the consciences of self and others as part of the mutual search for the good society. Finally, the citizen must judge. Judgments must be made of policy, political leaders, and self. It is particularly important that the citizen of a republic develops a critical view of the political economy, even though it is extremely difficult. As Pierre Bayle (1965/1697) noted, however,

*most men decide to accept one notion rather than another because of certain superficial and extraneous traits which they consider to be more in conformity with truth than with falsehood and which are easily discernible; whereas solid and essential reasons which reveal truth are difficult to come by. Hence, since men are prone to follow the easier course, they almost always take the side on which these superficial traits are apparent. (p. 376)*

It is this proneness for superficiality that is dangerous to any republic, and it is why criticisms, even of personal behavior, are so vital to the health of the state. But people will lovingly criticize only those institutions, ideas, and people in which they find involvement and personal meaning.

This dualism should be encountered and challenged by students, leaders, and citizens by employing the earlier-stated democratic value tensions.

- Value tensions are central to civic debate that help citizens to understand historic events, analyze current issues, and address the problems inherent in democracy.
- One mark of an enlightened citizen is the ability to intelligently use these four sets of values in addressing matters of public interest and republic survival.

### **A second disposition: love**

If criticism is a necessary condition of the democratic mind, love moves us toward sufficiency. Montesquieu, writing in *Spirit of Laws* (D. W. Carrithers, 1977) stated, “A government is like everything else; to preserve it, we must love it” (p. 31). Within Western thought, the ancient Greeks provided us with language that exercised great influence on the modes of expression and discourse associated with the concept of love. The Greeks had many words for love, which relates to its importance in Greek life. From friendship (*philia*) to passion (*eros*) to high affection (*agape*), the Greeks—from Heraclitus in the sixth century BC to Empedocles in the fifth century BC—established love as the physical principle (unifying agent) of the universe. Heraclitus believed that there were two forces in nature—repulsion and attraction—and he suggested that love (*harmonia*) results from the tension of opposites. Empedocles held that similar phenomena attracted, and the result of this process of attraction is also love. The notion of the same and other—of Greek and Barbarian, of the one and the many—is still at the center of the political/economic debate and manifests itself in questions of freedom, equity, and justice. It was also at the center of Plato’s arguments on human discourse,

namely, the problem of opposition between the singular and the “infinite” dyad, and of their reconciliation and unity. Love was the agent of true discourse and the function of unification was its definition. The role of love, if we can think of the concept as playing a role, is one of unifying the parts from the reconciliation of singular and dyad, referring to the concept of many in one (*e pluribus unum*). Love is necessary in keeping the union a union.

Within the concept of love, an important attribute (of citizenship) is loyalty. The understanding of loyalty as an attribute of love can be traced back to Deuteronomy (6:5; K J V): “You shall love your God with all your heart” Israel is to have one loyalty—one love or unifying force. In Leviticus (19:18) this idea is extended to one’s neighbor: “Thou shalt love thy neighbor as thyself.” (Also see Matthew 22: 37–40 and Luke 10: 27–28.) The individual was to be loyal and love God and her neighbors.

The concept of love and its application to the state or country (other citizens) and even the land has been made explicit over time.

*It is also true that the victorious man’s conduct is often guided by the love of his friends and of his country and that he will, if necessary, lay down his life in their behalf.*

(Aristotle, *Nicomachean Ethics*, p. 121)

*These are the times that try men’s souls. The summer soldier and the sunshine patriot will, in this crisis, shrink from the service of their country; but he that stands it now deserves the love and thanks of men and women.*

(Thomas Paine, *Crisis*, 1773/1777, p. 23)

*That land is a commodity is the basic concept of ecology, but that land is to be loved and respected is an extension of ethics.*

(Aldo Leopold, *Sand County Almanac*, 1966, p. xix)

While love and loyalty to one’s soul, one’s self, one’s neighbors, and one’s environment are necessary attributes of the good citizen and society, it is also the case that the whole business of civic loyalty, or what Weber (1917) called the “ethic of conviction,” must be viewed with skepticism. Great injustices can be perpetrated in the name of love. So, if citizens are to pursue justice and truth, to say nothing of friendship, the necessary attribute of enlightened citizenship—criticism—must always be invoked.

### **Philosophy and meaning**

Meaning is achieved through engagement. Engagement means being intensively involved with others in common activities, commonly perceived as good for self as well as for others so engaged. Meaning may be at the heart of happiness as well as the heart of citizenship. Meaning and citizenship are linked as well as limited in two significant ways.

One has to do with settings of time and place, and the other with rhetoric. Conceptual limitations are defined by place and time, or in terms of receiving meaning from



the utterances of others, by convention and circumstance. Paraphrasing Habermas, Cherryholmes (1985) suggests that meaning resides in what the speaker is engaged in, and what the hearer is counting on. To be meaningful, communication must rest on truthfulness and comprehensibility, but these elements of rhetoric will only “work” within a homogeneous context where norms and expectations are shared. We could even add discipline and logic to rhetoric to obtain a more complete notion of discourse, and still fall short of a definition of meaning that ties together love and criticism. *Meaning within.* This more complete sense addresses, not only the context of discourse, but discloses those human visions or theories of social systems that illuminate as well as disguise and conceal the ethical acts of people. Meaning cuts through to the moral bone of society, baring the collective nerve and exposing such questions as: Who rules? Why? What rules should we follow? Why should we obey them? Will obeying rules lead me to the good society and life?

Any discussion about the relationship between rules and the good life are usually stated in the sequence of “rules, then virtue” (character). That is, rules cause a person to be good, and virtue follows rules. The belief is that the house of virtue is entered through the door of rules, as the temple of reason is entered through the courtyard of habit. However, meaning is brought to life when we first focus upon virtue, and let virtue help create good rules. Rules and virtue do work together, but “good” rules simply follow from virtue. The philosophical questions at issue, then, are: What is the nature of virtue? Can virtue be taught? And, what is the relationship between virtue and meaning, virtue and education, and virtue and the concept of citizen?

### **Using philosophy to cultivate virtue**

A truth about education within a republic: *One should go to school, not just to become better-off, but to become better.* Every society and culture has its operational system of philosophy. The issue is never the existence of values, but the nature of those values. Do they illuminate the best of human hope, faith, courage, integrity, and compassion, or do they deny the universality of the human spirit? Such a denial, of course, separates and belittles the different and the unique among us. It skews power and resources into the hands of the few and the very few. Such a denial also betrays the future and ignores the past by failing to cherish human beings and their accumulated wisdom. Illumination needs intentional inquiry, and within the context of a democratic republic, education, by definition, means an inquiry into wisdom (virtue/vision).

To enhance our discussion and help move educational content and practice toward teaching philosophically, we might ask:

1. What is virtue?
2. Can virtue be taught?
3. What is the nature of good and evil?
4. What knowledge is of most worth?
5. When may the individual justly heed a “higher” law than that of the state?
6. Who/what do I love?
7. How can I achieve happiness and freedom?
8. What obligations do I have to my parents (past); to my children (future)?

9. What obligations do I have to my community?
10. What is a good person? A good society?
11. What facts about our society and the world support my social theories? How do I know?

Students might address questions like these through readings and discussions, and by writing about their own ideas, giving attention to motives, behaviors, research, and consequences of their actions and thoughts.

### **Curriculum as questions**

In addition to the emphasis placed on the kinds of questions just listed, we can consider developing new units, modules, and courses, as well as units within existing courses. It would be useful to develop such courses in the context of how they would help students understand philosophy in a more direct way, that is, in a way that will focus on those contemporary issues that help raise persistent philosophical questions and outline the philosophical perspective. Consider, for example, high school or undergraduate courses that might address the following questions:

#### ***Aesthetics, environment, and architecture***

- What is the proper relationship between the “house” in which we live and the demands upon the environment?
- Between lifestyle and resources?
- Between individual and social needs?
- Between individual and social costs?

#### ***Law and conscience***

- Can the law work without voluntary compliance to that law?
- Is law the antithesis of ethics?
- Is being at war the natural state of humankind?

#### ***Society and science***

- How can the paradigm of science (reliance on facts, questions, and testing assumptions) be used to study political, economic, and social systems?
- What role should the humanities play in the study of society and science?
- How should public policy on scientific issues be made and judged?

#### ***Ethics and technology***

- What is the relationship between tools and world view?
- How can technology lead one person or a whole society to redefine relationships and life?
- To what degree is social (and human) evaluation driven by technology (tools)?
- As the line between biology and technology becomes less clear, what philosophical questions must be asked?

Given our present temporal location, it would seem that some creative curriculum activities in these directions might be fruitful in the developmental process of helping students become enlightened citizens. These kinds of courses might also help us address the basic obligation of schools in a democratic republic—that of freeing individuals from irrational constraints on their behavior and thoughts—while at the same time promoting continuity of our core values.

In addition to content such as the foregoing, there are several ongoing issues or questions that modern leaders and citizens of a democratic republic should address. These can be used by teachers at any grade level as they prepare lessons about citizenship. They offer an intellectual crucible out of which can emerge better citizenship instruction. There are seven questions discussed here, but the list itself should not be considered as comprehensive. It is suggested that the process of working through these questions will help establish the necessary conditions of mind for one to assume leadership and the office of citizen in a democratic republic.

***1. What is the proper relationship between the constitution of the state (nation) or common law, and the character of its citizens?***

It seems to *be* the case that the office of citizen is unnatural to the character of the individual. The person is fundamentally a private being, content with family and friends but uncomfortable in the more public role of citizen. Nature seems to have crafted us for the private life, yet civic responsibility demands public involvement. Even more basic is the notion that there must be, in all citizens, an understanding that our government or constitution is implemented through the character of each of us. In a real sense, civic education is unnatural, for it addresses the public side of life and the realization that private character and public virtue are linked in ways that are mutually interactive. That is, the ability to develop privately (to become the good person) is always tied to the group (the building of the good society). Good citizens understand this relationship and work to overcome the unnatural attitude of being public persons. They come to the realization that happiness is always defined within a civic or public framework. From Pericles to Marcus Aurelius, from Thomas Jefferson to John F. Kennedy, from Eleanor Roosevelt to Mother Teresa, there is agreement that service to your city, state, or nation is not only the right or even the good thing to do, but the joyful thing to do.

***2. What is the proper relationship between self-interest and public interest?***

The state exists because the people give their authority to it. The state also exists to give the people justice. Thus, the state is made legitimate because of the people, and the people experience justice because of the state. This exchange occurs when people become involved in their government and raise certain questions about that involvement, such as:

How can I contribute my ideas and authority to the state?

How can I be assured that the state is doing justice to all its citizens?

These questions form the basis for civic responsibility. They address how an individual sanctions his government (i.e., through voting, circulating petitions,

working for candidates, running for office, and so forth) and judges the quality of laws and legislation passed and implemented in society, always keeping in mind the direct relationships between self-interest and public welfare.

**3. *What is the relationship between forms of government and social economic class? Will a large impoverished mass and a small elite generally produce oligarchy? Does greater equalization of wealth favor democratic rule? In our republic, why is wealth creating more important than poverty?***

The ancient Aristotelian idea that there is a relationship between a society's distribution of wealth and its form of government keeps returning. (See, for example, *A Vision for America's Future: An Agenda for the 1990's* (Children's Defense Fund, 1989.) Perhaps, the most important knowledge for the citizen is to understand how economics and politics work together in forming public policies that will create wealth and diminish poverty. There is a symbiotic relationship between capitalism and democracy, and citizens must understand the balance that is established between personal (economic) freedom and public (political) law. The individual plays various roles within the personal and public domains of society and must care for the home as well as for the community, supporting each so that both are strong and healthy. Ignorance and poverty of even the few diminish the well-being of the many. Ignorance of the many, however, destroys democracy and capitalism. The citizen's role, then, is to take Aristotle seriously, for, whether we like it or not, wealth, power, and knowledge, which are all interrelated, must be earned by all citizens. This is the beginning of social justice.

**4. *What is the relationship between education and democratic citizenship?***

What is clear in the writings of virtually every Western philosopher from Aristotle to Jefferson is the argument that education is a necessary requirement for one to hold the office of citizen. What is less clear is the content of that education, and to be clear about the difference between education and training. Training is for employment; education for citizenship. These goals are particularly perplexing today, and have been since the federal government involved itself in "training" and employment programs under President Nixon.

Aristotle recommended the educational goal of reasoning, and Jefferson argued for a common education for all citizens paid for by the state. He also suggested that the curriculum include the study of history. Over the past 50 years, more attention has been given to the issue of content (Hartoonian & Laughlin, 1989), and it does seem that the following knowledge areas appear necessary for citizenship education in a democratic republic: the study of the cultural heritage; the study of the political, economic, and legal systems; the study of rational and ethical decision making (philosophical reasoning); and some sort of mandatory civic involvement with the community (nation or world). What is most agreed upon is the idea that, within the republic, literacy and freedom are inseparable.

**5. What is the relationship between the health of our social institutions and the well-being of our citizens?**

The fragility of democratic institutions is a concern for citizens. The realization that families, schools, the judicial system, Congress, business, and even the presidency can become ethically weak and malfunctioning can cause citizens to understand, even if only dimly, that their personal well-being is directly tied to the existing health and improvement of our social institutions. This means, of course, that we need to make greater investments of time, energy, money, and especially knowledge in our material and ethical infrastructures and institutions. But, since institutions are run by citizens, the ethical conduct of the individual determines the health of the institution. It is a truism, but not always taken seriously, that our democratic republic and our capitalistic economic system cannot exist without ethical people caring for the family, firm, and community. That is, all citizens must understand that their own self-interest is tied to the health of the total society. And, societal health is dependent on civic duty practiced among citizens in and among all institutions. This is what self-interest properly understood means. That is, the individual and institutions are tied in an ethical contract.

**6. What is the relationship between the historical myths of individualism and the assumptions about the inclusive reality of the 21st century?**

The diversity, international trade, poverty, cultural pluralism, and proper education within and among modern nations are realities for the citizen today. Customs, laws, and social practices that have separated people in the past will have to be altered, for logic simply calls for the inclusion of all people into the community, into political involvement, and into the economic system. The demographic changes taking place throughout the world are so profound that the question of how we define our “inclusive reality” may be the most serious issue confronting us today. What grand narratives or irresistible ideas can hold citizens together? They cannot be based on fear, ignorance, unverifiable belief systems, or nostalgia.

**7. What is the proper relationship between natural law and positive law?**

Laws and “natural” principles suggest a tension that is necessary to the maintenance of justice in any society. We have seen this tension from Sophocles’ *Antigone* to Martin Luther King Jr.’s *Letters from the Birmingham Prison*. Citizens must understand this tension and how to use it in crafting better governing processes. “Higher laws” are principles to which citizens make reference when challenging current laws. There is always a need for a higher reference, because all laws and governments are based upon an ethical system that helps keep people from causing too much mischief. On the other hand, people can do even greater mischief in the name of the church or temple or flag, particularly when they believe they are doing God’s work or the work of the country. What citizens of a democratic republic must be able to do is balance the higher references with legislation, keeping in mind the dynamic nature of all law and the realization that governments and people have the potential for both good and evil.

## Conclusion

Citizens the world over, and of all ages, are concerned with concepts such as good and evil, relationships with others, their future and the creation and sustainability of the good society. The exploration of the foregoing questions, issues, and course ideas provide a point of entry into this important work. Perhaps the concern is even more fundamental in that it is only when we engage the synoptic discipline of philosophy to our investigations will we be able to search for wisdom. Beyond this, the study of philosophy also serves to establish or give citizens a significant part of those data necessary for the intellectual discussion of public issues. Philosophy can help us stop fragmenting our intellectual and cultural resources. When we fail to use these resources, our investigations soon fall into the quicksand of simple answers or no answers to complex problems. In truth, can issues like war and peace, abortion, trade, environmental pollution, genetic engineering, and space exploration be intellectually discussed without reference to philosophy? Can we even begin to address these issues without a careful study of the tensions between the public and private lives of the citizen? Philosophy, its methods, concepts, and questions is not only an interesting discipline for these debates, it is the necessary epistemology.

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## **‘21<sup>st</sup> century practice in teaching and learning’ in New Zealand education: Strategic intention statements 2010-2016**

**Megan Lourie**

### **Abstract**

This article provides an account of New Zealand’s recontextualisation of globalised versions of the discourse of 21st century learning as expressed in the Ministry of Education’s strategic intention statements during the term of the Fifth National Government. During this period substantial funding was committed to school property and infrastructure upgrades. Changes were made to school property policy which resulted in the development and implementation of a nation-wide ‘modern’ building standard. The context of the development of New Zealand’s version of 21st century teaching and learning is considered here with reference to ideas found in OECD education literature, and to New Zealand’s economic challenges. It is argued that understanding New Zealand’s economic context helps to explain the significant emphasis placed on ICT and the physical environment which is evident in the strategic intention statements.

### **Introduction**

Ideas about the kind of education needed by New Zealanders for the 21st century have appeared in education policy since at least the publication of the New Zealand Curriculum Framework in 1993 (Ministry of Education, 1993). Just as many countries around the world are doing, New Zealand is promoting ideas and practices relating to 21st-century learning within education, presumed to be influenced to some degree by the OECD (Benade, 2017). This article provides an account of New Zealand’s recontextualisation of globalised versions of the discourse of 21st century learning as expressed in the Ministry of Education’s strategic intention statements during the term of the Fifth National Government. During this period substantial funding was committed to school property and infrastructure upgrades. Changes were made to school property policy which resulted in the development and implementation of a nation-wide ‘modern’ building standard.

The article begins by identifying the policy statements in which the Ministry of Education first signalled its intention to modernise all school teaching spaces and describes how changes were made to the 10 Year Property Plan in order to operationalise the policy intentions. It shows that a focus on property upgrades and the development of ICT infrastructure have preceded reference to teaching practice in education policy statements. While the most recent *Ministry of Education Four Year Plan* states “we are working to support the sector to develop 21st century teaching practice, flexible

learning environments and digital literacy” (Ministry of Education, 2016, p.18), explicit references to 21st century teaching and learning are a more recent addition to policy statements, appearing for the first time in 2015. This suggests that earlier policy statements were underpinned by a presumption that changes made to teachers’ physical environment would bring about the pedagogical changes assumed to be needed to teach effectively in the 21st century (Benade, 2017). The second section traces the way ideas about ‘21st century learning’ are framed in the Ministry of Education’s strategic intention statements from 2010 onwards. This process illustrates the early emphasis placed on the environment (primarily learning spaces and ICT resourcing) and the implicit nature of the connection made between *learning environments* and teaching in policy statements. The final section offers some broad observations about the context of the development of New Zealand’s version of 21st century teaching and learning, as represented in the strategic intention statements. Here it is proposed that the significant emphasis in New Zealand on the development of ICT (and more latterly digital technology) may be better understood by considering the broader economic context for those.

### Modernising Teaching Spaces

The Ministry of Education’s intention to modernise all school teaching spaces was first announced in their Statement of Intent 2010 – 2015. A number of initiatives being implemented relating to the school property portfolio were identified in this statement, including the introduction “of a modern learning environment standard for schools to use to measure their teaching spaces” (Ministry of Education, 2010, p.30). The significance of this announcement may have initially gone un-noticed by some schools who were not directly involved in current school property upgrades at the time. Certainly as someone was teaching in a secondary school when this policy announcement was made I have no recollection of discussions about the apparently impending transition in terms of teaching spaces from traditional classrooms to modern learning environments, either in formal staff meetings, or informal staffroom conversation.

The Statement of Intent 2010-2015 (Ministry of Education, 2010) also announced that a strategic plan for school property would be developed. The New Zealand School Property Strategy 2011-2021 (Ministry of Education, 2011a) was released the following year with three strategic goals: that school property is well managed, that schools are fit for purpose, and that the school portfolio is high-performing. In the introduction to the strategy, Secretary for Education, Karen Sewell notes “[i]t is widely recognised that school environments influence student learning and teaching practice. Therefore, we need schools that have appropriate physical infrastructure, ICT and environments that support the learning needs of all students” (Ministry of Education, 2011a, p.1). This statement illustrates two key tenets that continued to underpin National government’s school property policy for the duration of its term; the first is the direct relationship assumed to exist between the physical environment and pedagogy (Benade, 2017). This assumption is clearly expressed further on in the strategy when the requirement for schools to adopt the Modern Learning Environment (MLE) standard as they become due for their next round of property funding is stated. “Achieving this outcome is critical to modern education delivery and will ensure that the *performance of the physical*

*environment is linked to educational outcomes* (Ministry of Education, 2011a, p.13, emphasis added). The second key tenet of the National government's school property policy, and in fact, their education policy aims and intentions more generally, is the importance of ICT, an idea which I will return to later in the article.

The New Zealand School Property Strategy 2011-2021 set some bold targets in terms of creating modern learning environments: by 2015 10% of existing school property would meet the “core” MLE standard by 2015, and by 2012, 100% of new schools would meet the “advanced” MLE standard (Ministry of Education, 2011, p.15). Taking into account the approximately 38,000 classrooms included in the property portfolio, the Ministry of Education predicts in the strategy that it will take until 2021 “for all schools to modernise all of their teaching spaces”(Ministry of Education, 2011a, p.13), leaving little doubt about the vision for state education held by the National government.

Policy goals or intentions mean very little unless sufficient resourcing and a mechanism for implementation accompany them. In a recent article, Leon Benade (2017) provides a careful analysis of the education budget lines referring to maintenance or capital investment in school property. Benade notes that during the period 2011 to 2016, capital expenditure allocation associated with school property in the education budget rose by 57.13 percent. While this increase in the capital expenditure may in part be associated with the costs associated with work needed in Christchurch after the devastating earthquakes of late 2010 and early 2011, Ministerial press releases during the same period make it clear that significant investment in school property was occurring throughout the country (Benade, 2017).

The Modern Learning Environment (MLE) standard introduced in 2010 was accompanied by the requirement that schools adopt those standards as they became due for their next round of property funding. The mechanism to ensure this happened was a change made to the 10 Year Property Plan (10YPP). In New Zealand, school boards of trustees are the “custodians” of school property and must ensure that they follow Ministry standards and guidelines (Ministry of Education, 2011a, p.3). Boards of trustees sign a Property Occupancy Document (POD), which is a legally binding document similar to a lease, with the Ministry of Education as landlord, and BOTs as tenants (Ministry of Education, 2018a). The Property Occupancy Document requires schools to have a 10YPP. The 10YPP is an extensive property-planning document, which must be prepared by an approved 10YPP consultant property planner, then submitted for Ministry approval every 5 years. As part of developing their 10YPP, boards of trustees are also required to complete an Innovative Learning Environments<sup>1</sup> assessment every 5 years. The assessment process is assisted by the use of an online questionnaire for the explicit purpose of “help[ing] boards of trustees create Flexible Learning Spaces (FLS) in all New Zealand schools over the next 10 years” (Ministry of Education, 2017).

While in some ways it may appear as though the fairly rapid implementation of a MLE standard as part of the School Property Strategy has come out of the blue, policy

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1 Modern Learning Environments have been referred to as Innovative Learning Environments since 2015 when the Ministry adopted the OECD's term, Innovative Learning Environments, to refer the learning ecosystem, and Flexible Learning Spaces to refer to the infrastructure element of an Innovative Learning Environment (Ministry of Education, n.d).

statements suggest that New Zealand has been considering ideas relating to education for the 21st-century for some time. Putting 21st-century learning principles into practice may include making changes to the physical environment in a school and greater use of ICT to enhance teaching and learning. It may also include pedagogical shifts which, for example, may include student-centred learning, integrated approaches to curriculum, and inquiry models of learning. While latter policy statements signal a greater focus on pedagogy and curriculum, a close reading of the Ministry of Education's annual Statements of Intent from 2010 onwards indicate that the initial focus in New Zealand has been on developing and resourcing both buildings and ICT capacity in schools.

### **A focus on the physical environment and ICT**

This section of the article illustrates the way ideas about '21st-century learning' are framed in the Ministry of Education's strategic intention statements<sup>2</sup> between 2010 onwards, when the intention to implement a Modern Learning Environment standard was first announced, and 2016 (the most recent statement currently available). A close reading of the strategic intention statements published over this period was undertaken, and statements relating to the terms were collated: *modern or innovative learning environments*, *21st-century learning*, *ICT*, *broadband*, and *technology*. These terms all appear in the School Property Strategy, with the exception of *21st-century learning*, and represent the perceived resourcing needs associated with the delivery of education in the 21st-century. The results of this exercise are presented in Table 1. In some cases there was repetition of similar ideas expressed in different places in the strategic intention statement. When this occurred, a single representative statement was included in the table. The purpose of this activity was to enable a clearer sense of the way ideas about the kind of education thought to be needed in the 21st century have been expressed and resourced since 2010.

Table A shows the emphasis on property upgrades and the development of ICT infrastructure in the strategic intention statements during the period 2010-2016. In 2010 the modern learning environment standard is announced and in 2011 a key action statement is the implementation of that standard. Significant emphasis is placed on the development of broadband capability in the statements of 2010 and 2011 because "[e]quipping young New Zealanders to participate in and contribute to a world increasingly shaped by ICT is a focus for the Ministry (Ministry of Education, 2010, p.8). When read in chronological order, it is evident that the early strategic intention statements are underpinned by an assumption that changes to the physical environment and increased access to modern technologies will not only bring about changes in teaching practice, but are in fact, "*critical* to support shifts in teaching and learning practice, and improvements in student achievement" (Ministry of Education, 2011b, p.9, emphasis added). References to the resourcing of ICT/technology infrastructure appear in every statement from 2010-2016 and references to digital literacy and digital technologies begin appearing from 2013 onwards.

Another feature of the strategic intention statements is the emphasis on *learning*, and

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2 These statements were initially termed 'Statements of Intent' up until 2015 when they became '4-Year Plans'.

the idea that technology is a key enabler of learning. For example, the 2012 statement refers to technology which “allows education providers to offer new approaches to learning that engage and connect learners across local and global networks” (Ministry of Education, 2012, p.10). The link between learning, and learners’ access to technology is repeated in the same assertion made in both the 2013 and 2014 statements, “[n]ew technology has the power to transform how children and young people learn” (Ministry of Education, 2013, p.2). This focus on learning implies a change of role for anyone teaching, but *teaching* is a term that rarely appears in the strategic intention statements until 2015. In the statements of both 2015 and 2016 the Ministry of Education’s declares an intention to “[c]hampion 21<sup>st</sup>-century practice in teaching and learning”. This is the first time that teaching and learning are mentioned separately, possibly implying that there might be some *teaching practices* that can be identified as having 21<sup>st</sup>-century characteristics. There is further evidence to support the idea that there might be increasing recognition of *teaching practices* as distinct from the *physical environment* in the 2016 statement in the following statement; “we are working to support the sector to develop 21<sup>st</sup> century teaching practice, flexible learning environments and digital literacy” (Ministry of Education, 2016, p.18). The intention to develop 21<sup>st</sup> century *teaching practice* may also imply some acknowledgement that changes to the teaching environment on their own have not necessarily brought about the intended shifts in teaching practice.

**Table 1: Ministry of Education Statements of Intent/4 Year Plans from 2010-2016**

Period	References to: <i>modern/innovative learning environments, 21<sup>st</sup>-century learning, ICT, broadband, technology.</i> Note: Phrases in bold below indicate strategic intention/action statements
2016-2020	<p><b>Champion 21<sup>st</sup> century practice in teaching and learning (p.8).</b></p> <p>Demand for future-focused learning is increasing – the Ministry’s ICT strategy and our 21<sup>st</sup> century practice in teaching and learning priority ensure we have the right focus to meet this need (p.10).</p> <p>[W]e are working to support the sector to develop 21<sup>st</sup> century teaching practice, flexible learning environments and digital literacy (p.18).</p> <p>The infrastructure portfolio is a key enabler of the Ministry’s strategic intentions: supporting 21<sup>st</sup> century learning practices through the provision of flexible learning environments (p.30).</p> <p>The education agencies’ Digital Strategy...will enable access to digital learning opportunities to support 21<sup>st</sup> century practice in teaching and learning (p.30).</p>
2015-2019	<p><b>Champion 21<sup>st</sup> century practice in teaching and learning (p.15).</b></p> <p>Demand for future-focused learning is increasing – the Ministry’s ICT strategy and our 21<sup>st</sup> century practice in teaching and learning priority ensure we have the right focus to meet this need (p.18).</p> <p>Our ICT strategy...will enable access to digital learning opportunities to support 21<sup>st</sup> century practice in teaching and learning (p.35).</p> <p>The property portfolio is a key enabler of the Ministry’s strategic intentions: enabling 21<sup>st</sup> century learning practices through the provision of innovative learning environments (p.36).</p>

<p>2014-2018</p>	<p>We need to provide our children and young people with modern learning environments based on great infrastructure and technology (p.4).</p> <p>The key drivers of change in the education system’s environment are... developments in technology that will need to be harnessed to enable a future-focused education system (p.12).</p> <p>New technology has the power to transform how children and young people learn. We will develop and implement a digital education strategy, which will support schools and educators to harness new technologies to prepare students with 21<sup>st</sup> century skills (p.2).</p> <p>Creating a modern learning environment ensures quality teaching and learning opportunities are available to every teacher, child and student. Using digital technologies will extend the reach and depth of their experiences, helping to keep children, students and their communities engaged in learning (p.22).</p> <p><b>Create a modern learning environment (p.22).</b></p> <p>Learning with digital technologies helps equip children and students with the range of skills they need to participate in a modern, future-focused economy. Digital technologies also have the potential to make the current education system more cost effective and accessible (p.22).</p> <p>[C]ontinuing to invest in digital infrastructure so that by 2016, all state and state-integrated schools will have an upgraded internal IT network and be connected to fibre or alternative technologies via the Government’s ultra-fast broadband initiative (p.22).</p>
<p>2013 -2018</p>	<p><b>Support a 21<sup>st</sup> century learning system with high-quality, relevant learning environments (p.28).</b></p> <p>New technology has the power to transform how children and young people learn (p.2).</p> <p>[E]nsuring that the schools are modern learning environments, equipped to realise the transformational power of digital literacy, is a key enabler of greater student participation, engagement and ultimately achievement (p.22)</p> <p>Over the next three years, 97.7% of schools and kura will have access to ultra-fast broadband delivered through fibre, as part of the Government’s \$1,500 million investment in broadband (p.27).</p> <p>[W]e will develop a comprehensive education strategy for 21<sup>st</sup> century learning and digital literacy (p.27).</p> <p>[P]roviding the infrastructure support schools require for 21<sup>st</sup> century learning (p.5).</p> <p>Support the development and use of digital literacy and modern technologies (p.27).</p> <p>In partnership with the education and technology sectors, we will develop a comprehensive education strategy for 21<sup>st</sup> century learning and digital literacy (p.27).</p>



2012 - 2017	<p>Technology allows education providers to offer new approaches to learning that engage and connect learners across local and global networks. This equips learners with the skills they need to operate successfully in an increasingly technology-driven society (p.10)</p> <p><b>Develop a 21<sup>st</sup> century learning system with high-quality, relevant learning environments (p.14).</b></p> <p>In order to raise achievement and ensure that educators are able to provide quality educational experiences for all learners, we will invest in primary and secondary school infrastructure, delivering modern learning environments (p.23).</p> <p><b>Invest in ultra-fast broadband and school network upgrades (p.23).</b></p> <p>In 2012/13, we will invest \$200 million to support boards to plan for capital upgrades, including upgrading to modern learning environment standards (p.23).</p> <p>Over the next five years, 97.7% of schools will have access to ultra-fast broadband delivered through fibre, as part of the Government's \$1,500 million investment in broadband. The remaining schools, which are in the most remote areas, will receive high-speed wireless or satellite connections (p.23).</p>
2011 - 2016	<p>The use of modern technologies is critical to support shifts in teaching and learning practice, and improvements in student achievement (p.9).</p> <p>We need to think of the education system in a more integrated way – considering how education property, ultra-fast broadband and clusters of schools can work together more effectively to make the most of the opportunities afforded by modern technologies and an increasingly connected world (p.11).</p> <p><b>Support schools to use modern technologies and access ultra-fast broadband to enable lifts in student achievement (p.18).</b></p> <p><b>Implement Modern Learning Environment standards (p.36).</b></p>
2010 -2015	<p><b>Preparing schools for ultra-fast broad-band (p.29).</b></p> <p>We must have teaching and learning environments that are focused on the needs of students and promote achievement. School property should be well-maintained and responsive to the changing needs of all students. Teachers and students need fast and reliable access to a wider range of more powerful learning technologies (p.2).</p> <p>Equipping young New Zealanders to participate in and contribute to a world increasingly shaped by ICT is a focus for the Ministry (p.8).</p> <p>In order to realise the educational benefits of this changing landscape, major investments are being made internationally in broadband-related technologies for schools (p.29).</p> <p>The Ministry's total capital expenditure over the next four years is \$2,165 million, of which \$2,066 million is to be spent on the school property portfolio and the balance on Information and Communications Technology (ICT) and other chattels. The major capital intensive activities within the property portfolio are modernising existing schools and constructing new schools to meet the demands of schooling and demographic changes (p.30).</p> <p>Government has committed funding to prepare schools for broadband. Capital upgrades to schools will be conducted through the School Network Upgrade Programme. This work is focused on ensuring that all schools are able to be connected to ultra-fast broadband (p.30).</p> <p>A range of initiatives are being put into place to ensure that the Ministry achieves its intermediate outcomes and to ensure the school property portfolio is responsive to modern teaching and learning requirements, including...introducing a modern learning environment standard for schools to use to measure their teaching spaces (p.30).</p>

### **The context of New Zealand's version of 21<sup>st</sup> century teaching and learning**

This section of the article offers some broad observations about the context of the development of New Zealand's version of 21st century teaching and learning, as represented in the policy statements discussed previously. When considering 21st century learning, the OECD is often identified as a key influence on New Zealand education policy (Benade, Gardner, Teschers & Gibbons, 2014; Benade, 2017; Smardon, Charteris and Nelson, 2015) and it is not difficult to find evidence to support this claim. For example, the Ministry of Education has established an *Innovative Learning Environments* website (Ministry of Education, n.d.) which makes explicit links to the eponymous research report published by the OECD (OECD, 2013). Over time, ideas about the principles and practices of 21st century teaching and learning have continued to be developed and refined in OECD education publications. Looking at the foci that are apparent in Table 1, it appears that the line of travel New Zealand has taken with reference to ideas about 21st century learning is, generally speaking, fairly similar to that of the OECD, however, New Zealand has continued to place considerable emphasis on the role of ICT.

Emphasis on the development of ICT infrastructure, which has continued to be a salient feature of New Zealand's strategic intention documents, is apparent in the OECD's influential publication *Learning to Change: ICT in schools* (OECD, 2001). *Learning to Change* claims that “[a]ll countries wish to enhance the quality and effectiveness of the learning process in schools, and are looking to ICT as the means whereby this may be achieved” (OECD, 2001, p.9). New Zealand certainly seems to fit this description as ICT has featured in education strategy statements since the late 1990s. Three ICT strategies were released over an 8 year period, beginning with *Interactive Education* in 1998 (Ministry of Education, 1998). This was followed by *Digital Horizons: Learning through ICT* (Ministry of Education, 2002) which refers directly to *Learning to Change*, and *Enabling the 21st Century Learner* (Ministry of Education, 2006). These strategies were focused on building infrastructure (networks, software, hardware, technical support and broadband access) as well as providing professional development for teachers.

Two other significant ideas are presented in *Learning to Change*. The first is that the educational potential of ICT “cannot be realised without radical changes in school structures and methodologies”, and the second is that ICT “may become both the driver and facilitator” of curriculum change (OECD, 2001, p.15). These two ideas appear to be reflected in the Ministry of Education's policy development in its promotion and resourcing of modern/innovative learning environments and ICT infrastructure. In particular, the suggestion that greater access to ICT in schools may result in significant changes in curriculum design and pedagogy appears to have been taken as a likelihood in the New Zealand context.

Another influential OECD publication *The Nature of Learning* (OECD, 2010) signalled a significant development in the focus of thinking about educating in the 21<sup>st</sup> century. Learning was moved to centre stage. This publication acknowledged that the rapid development and ubiquity of ICT was re-setting the boundaries of educational possibilities. However, it also noted that significant investments in digital resources had not on its own, revolutionized learning environments, and that in order to change



learning environments, attention needed to be paid to the nature of learning. As described in the previous section, there is some reflection of this change in emphasis in New Zealand's strategic intention statements, but the development of ICT capability appears to have continued to dominate. Despite the recommendation in a Ministry of Education commissioned report that “our investment in 21<sup>st</sup> century technologies must be matched by new thinking that reflects the best teaching approaches” (Bolstad et al, 2012, p.iii), reference to teaching practices do not appear in the strategic intention statements until 2015.

The more recent Ministry of Education intention “to support the sector to develop 21<sup>st</sup> century teaching practice, flexible learning environments and digital literacy” (Ministry of Education, 2016 p.18) reflects a central idea in the OECD publication *Innovative Learning Environments* (OECD, 2013); that there are several different components when considering a learning environment, which include both physical resources and teachers.

While there is general similarity between the line of travel taken by the OECD and what is expressed in New Zealand strategic intention statements, the development and implementation of ideas about 21<sup>st</sup> century learning in New Zealand has seen a greater emphasis placed on physical spaces and ICT/digital technology. This is a narrower view of the educational possibilities associated with 21<sup>st</sup> century teaching and learning promoted by the OECD, a difference illustrated in the 2012 Select Committee Inquiry into 21<sup>st</sup> century Learning Environments and Digital Literacy. For the purpose of this inquiry the term 21<sup>st</sup> century learning was taken “to mean the changes to teaching and learning in schools that result from digital technology” (Education and Science Committee, 2012, p.9).

The emphasis in New Zealand on ICT (and more latterly digital technology) is perhaps better understood by considering a less traversed area in the literature; that is, the broader economic context for local developments in the principles and practices associated with 21<sup>st</sup> century education. OECD publications openly acknowledge the economic rationale for the interest in developing ideas about education for the 21<sup>st</sup> century. After all, it is the Organisation for *Economic* Cooperation and Development. Three rationales for the inclusion of ICT in education are identified in *Learning to Change* (OECD, 2001): the economic, the social and the pedagogical. The economic rationale is described as follows:

*[T]he focus is on the perceived needs of the economy – present and future – and the requirement in many areas of employment to have personnel with ICT skills. Knowledge of and familiarity with ICT is an important aspect of employability as the 21st century unfolds. There is a widespread expectation on the global scale that those nations successfully embracing the information age will benefit economically (OECD, 2001, p.10).*

The final sentence in the excerpt above resonates with New Zealand's efforts to reconfigure its economy from the 1970s onwards after the end of its post-second world war economic boom. As Freeman-Moir (1997) observes, “inevitably, economic crisis leads to educational crisis, to a demand for cutbacks, for a return to basics and

vocational relevance (p.216). The influential Porter Report, entitled *Upgrading New Zealand's Competitive Advantage*, criticised the education system for “not equipping people with the skills necessary to compete successfully in the global economy” (Crocombe et al, 1991, p.105) and for developing educational goals and priorities independently of an understanding of the economy and its prospects for future development. The implementation of New Zealand's outcomes-based curriculum from 1992 onwards reflected an expectation that the education system would contribute in a more responsive way to a changing global economy as signalled in the introduction to the 1993 Curriculum Framework, “As we move towards the twenty-first century, with all the rapid technological change which is taking place, we need a work-force which is increasingly highly skilled and adaptable, and which has an international and multicultural perspective” (Ministry of Education, 1993, p.1).

The shift to implement modern or innovative learning environments, with a significant emphasis on ICT and digital technology in New Zealand schools is part of the overall aim of developing a more skilled workforce within the context of a lengthy period of economic decline, and more recently, within the context of the post-1998 Global Financial Crisis. The School Property policy acknowledges this context of economic constraint noting that “delivering these imperatives at a time when there are significant constraints on government expenditure means we must have the clear vision, goals and priorities for school property that this strategy provides” (Ministry of Education, 2011a, p.1). The demands for New Zealand to innovate, to be entrepreneurial, to diversify its economy and to compete on the world stage continue to be reflected in education policy statements. For example, the foreword to the New Zealand Curriculum of 2007 notes that since the implementation of the previous curriculum in 1992 “there has been no slowing of social change. Our population has become increasingly diverse, technologies are more sophisticated, and the demands of the workplace are more complex. Our education system must respond to these and the other challenges of our times” (Ministry of Education, 2007, p.4).

Understanding New Zealand's economic context helps to explain the different emphases placed on aspects of 21<sup>st</sup> teaching and learning by New Zealand in comparison to the OECD. This is not to suggest that practices in New Zealand schools have ignored the shift in emphasis from the use of ICT to thinking about the nature of learning, and more latterly, learning eco-systems, that is being promoted in OECD publications. However, at policy level, the framing of strategic goals relating to 21<sup>st</sup> century teaching and learning has had a distinctly instrumental flavour. In short, the strategic intention documents articulate a need to get value for money. Capital investment in education needs to be future-focused, and young people need to be equipped, via education, with the skills necessary to compete successfully in the global economy, hence the investment in flexible learning spaces that enable the use of digital technologies. This view is clearly articulated in final strategic intention statement published by the Fourth National Government.

*Education is critical to building a strong and successful New Zealand. It underpins our economy and how well we compete in the global market for jobs and innovation... It is an investment, and an investment with a big return (Ministry of Education, 2016, p.iv).*

The Fourth National Government's term came to an end in 2017, when a Labour-led government was voted in. Labour's strategic intention statement has yet to be published, so it remains to be seen whether the new government will continue to invest in flexible learning spaces and ICT/digital technology in the same way as its predecessor. Major changes seem unlikely given the length of time New Zealand has been attempting to restructure its economy to become a high skill, high wage competitive economy which is capable of attracting capital investment (Freeman-Moir, 1997). In the meantime, schools continue to upgrade their classrooms to create flexible learning spaces and teachers continue to develop their use of ICT/digital technologies with students. The recent changes made to the national curriculum, "in response to this fast-evolving world" (Ministry of Education, 2018b), so that it now includes digital technologies learning suggests that the current direction of travel is well-established and unlikely to change regardless of which party is in government.

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## **Similarities and Differences on Higher Education Policy across the Pacific Rim: Japan, Malaysia and Mexico**

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### **Abstract**

The present paper discusses higher education policies in Japan, Malaysia and Mexico, and evaluates each country's achievements and efforts by using a comparative analysis based on a method that looks into similarities and differences in a regional perspective, as these three countries are encompassed in the University Mobility in Asia and the Pacific (UMAP) Research Network. This paper certainly considers the measures each country has implemented pertaining to educational planning, and by conducting a survey, collects the assessments on higher education policy from different sectors of the society, including government officials, private sector managers and academics.

### **Introduction**

Taking into account that most of the extant literature review has come into an agreement regarding the existence of a robust association between education and economic growth or development, the participation of tertiary-education graduates from Japan, Malaysia and Mexico in the labor market of their respective countries, and consequently, their impact in those countries further development is the main focus of interest of this paper. The method used in the current paper allows to easily identify and straightforwardly analyzed similarities and differences across countries within the regional context of the Pacific Circle. This paper deals with the action plans and policy measures that these three countries have implemented with respect to tertiary education. Particularly, the paper illustrates the merits and demerits of each of the government's policy agenda regarding the promotion of higher-education young graduates' readiness for their participation in the labor market, which is assumed to be the outcome of utmost importance for college graduates currently. The paper focuses on higher education policy and the views of interviewees from different sectors of society, including government, business and academia, information that was collected by the conduction of a survey.

In this era, characterized by an unstoppable globalization process and the dynamism of the knowledge society, it is indispensable to count on better-educated and qualified people to significantly increase productivity, as well as to contribute to a better understanding among human beings, based on tolerance and respect among nations. Consequently, competitive human resources will benefit free trade because skillfully trained human capital contributes substantially to the competitive development of key industries and thus improves the quality of life for people. Additionally, the involvement of the government and other sectors of the society, such as academia and private sector,

in the efficient design and implementation of public policies should serve to effectively lead us to a path toward further development, a task in which young graduates play a very important role. Unfortunately, it is not uncommon to find that well-educated people face the harsh reality of widespread unemployment and underemployment, particularly right after graduation. The countries of the Pacific Circle are not excluded from this situation that is often observed ubiquitously across countries. Despite this fact, an increasing number of individuals, usually supported by their households, go on to tertiary education, because there is the perception that for a college graduate is much easier to improve employment prospects or be more successful in the job market. For this reason, this paper specifically focuses on higher education, as undergraduates receive the knowledge and training required to enter the labor market under better conditions. However, so far, the collected evidence has precisely pointed out that young graduates lacked work-readiness after graduation.

Based on a methodology developed in previous researches (Rangel and Ivanova, 2008; Rangel and Ivanova, 2012), the purpose of this study is to shed light on the role of higher education in Japan, Malaysia and Mexico in promoting workforce readiness, and to examine the underlying interconnection framework as Pacific Circle members, regarding policy design and its implementation in each country.

The central hypothesis of this study is that the information on policy implementation and its outcomes provided by each country's official sources is not sufficient to assess higher education policies in Japan, Malaysia and Mexico. This paper fills that gap by highlighting that there is significant scope for exploratory research that compare these three case studies from complementing perspectives, such as those of the entrepreneurial sector, governmental organizations and academia. In this manner, the paper identifies specific areas in which more efforts from all playing actors are needed, that in turn can help us suggest measures to formulate more comprehensive plans for the development of higher education in the Pacific Circle countries. Furthermore, we hope the information provided could strengthen the dialogue among networking countries in the near future.

### **Theoretical and methodological background**

In addition to natural resources and capital, labor factor has traditionally been considered a key determinant for the economic outcome or national income. There are other factors that have additional impact on the product such as technology or total factor productivity that refer not only to a technological component, but also to a residual component derived from the positive effects of learning-by-doing processes. Although labor factor's quantity and quality are important as they are conducive to more output, quality can trigger larger positive spillover effects that will not only be beneficial at individual and organizational level, but also at societal level. The quality of labor factor is associated with human capital accumulation that can be the result of education, training or working experience, mainly. Education that has been the main vehicle for human capital accumulation, is strongly associated with economic growth and development, as it is suggested by the extant literature review on theoretical and empirical studies (Schultz, 1961; Barro 1990; Barro and Lee, 1993; Romer, 1990; Sen, 1999). The research conducted by Sen (1999) deserves further explanation, as it goes



beyond the economic realm. Sen offers a framework, in which capabilities encompassed not only functional skills but also opportunities that lead to larger freedom to pursue wellbeing according to each person's own values and goals. At both, individual and aggregate level, freedom is intrinsic to development.

In the case of young graduates, an improvement in human capital is associated with an improvement of their competencies that are acquired throughout schooling, but particularly during tertiary education. Later on, they can continue accumulating human capital based on their own work experience and investing in more human capital through further education. Right after graduation, young graduates are expected to be prepared for a successful insertion into the job market, where they can display and make use of their best and full potential. However, as it has been evidenced by some empirical studies, "talent shortage" among recruits in the last years has been one of the main concerns of the companies' department of human resources in almost every emerging economy. According to the last annual survey of Manpower Group (2018), Japan and Mexico register 89% and 50% of talent shortage, respectively, while the average across 43 countries and territories is 45%. Those percentages indicate that almost 90% of the surveyed companies in Japan are facing difficulties filling open jobs, while the half in Mexico. This survey does not report on Malaysian recruits, but there is information regarding the continue skill shortage in this country in 2017, as 97% employers are struggling to find the skilled individuals they need (The Star Online, 2017). The rapid changing global economy is challenging higher education institutions, whose lack of flexibility does not allow them to cope and respond to those changes in a timely manner.

Regarding the input data, both, primary and secondary sources were employed in the current paper. The primary source for this research is the result of the survey, which has collected the required data through a questionnaire and interviews. The questionnaire was designed to gather opinions of a select group of renowned researchers, officials and executives, from the academia, government and private sector, respectively. The questionnaire consists of 37 items that are organized in the following clusters: 1. Subject Information, 2. Assessment of Higher Education Policies, 3. Assessment of Employment Policies, 4. Assessment of Economic Policies, 5. Assessment of Science and Technology Policies. For the purpose of this paper, authors are taking into account solely the interviewees' perception on higher education policy. The secondary sources, which this paper is based on, are the development plans, or similar official documents, of Japan, Malaysia and Mexico, as well as international and domestic analysis on the relationship between higher education and the perception of the public and private sectors and academia, such as Cogan (2004), Rangel and Ivanova (2008 and 2012), Tullao (2014), and Sueyoshi (2016).

In regard to the validity of the methodology used in this paper, the comparative method that has proved useful in the study of international relations (Rivas Mira and Garcíanava Requena, 2004), has been developed by the Italian school of Sartori (2002) and other followers that have formed an effective methodology for decision-making. One of the most significant questions to which the comparative method attempts to answer is why to compare? The comparative approach involves parameters collected from comparable cases and the use of categories of analysis derived from the theoretical

framework and other conceptual schemes. In this regard, the comparative method is a technique generally employed in the social sciences, aimed to understand, explain and interpret a specific object of study. As it is applied to the analysis oriented to the construction of scientific knowledge, this method is considered to be a specialization of the scientific method.

Another aspect to be considered pertaining to the comparative analysis is that the means for knowledge acquisition are infinite, and implicitly and subconsciously it is possible to understand the differences or similarities, by contrasting one to another, only if both belong to the same group, and consequently are comparable. This leads us at least to a couple of questions: What to compare? and How to compare? Regarding the first question, virtually everything can be compared. However, it is necessary to consider that comparison for the purposes of scientific analysis can be restricted precisely by the marginal situations of two or more comparable entities. As two or more potentially comparable entities become extremely similar or extremely different, the less relevant the comparison is. That is to say, strictly equal or diametrically different issues are no longer relevant to be compared. So, that the absolute similarity or absolute difference nullifies the comparison, disregarding this methodological approach that is looking for *ad hoc* decisions associated with global trends.

In relation to the second question, how to compare, the comparative method suggests a range between 2 and 20 cases. Statistically speaking the sample was neither randomly selected nor comprised by a large number of subjects, therefore biases and distortions or generalizations can threaten statistical reliability. For that reason, the hypothesis control becomes a highly needed methodological tool. Our three selected countries belong to the Pacific Circle but also to other organizations such as APEC and to others that play a role in the construction process of integration schemes such as the Transpacific Partnership (TPP-11) or Free Trade Agreement in Asia Pacific (FTAAP), as binding-driver axis among the participant members of UMAP. The control hypothesis becomes of crucial importance, given the statistically small-sample size that can easily lead us to erroneous generalizations. The hypothesis design arises from the structure of a formal logic, in which the dependent and independent variable approach, or quantitative and qualitative variable approach lead us to more robust explanatory analysis of the object of study.

Given the international background that is necessary for placing these three case studies altogether, we intend to capitalize on the use of the international arena in order to address specific issues such as public policy in the field of higher education, and analyze it according to the development process in Japan, Malaysia and Mexico. Finding differences and similarities is useful for those economies seeking to make the best decision through economic policy, which in turn not only can have impact on university enrollment, but also on the household aspirations toward higher education, and on the shared responsibility of public and private sector to generate quality jobs.

### **Reference framework and field study results**

This section presents the three governments' stances regarding higher education policies, which are reflected in official documents, such as the white papers from the Ministry



of Education, Culture, Sports, Science and Technology, and Ministry of Health, Labor and Welfare for Japan, the National Higher Education Strategic Plan for Malaysia, and different Sectoral Programs of the National Development Plan for Mexico.

### ***Higher Education Policy in Japan***

According to the Ministry of Education, Culture, Sports, Science and Technology (MEXT), “from a mid-to long-term perspective the Japanese higher education should meet broader and more diverse expectations and demands posed by two drastic and continuous changes. The first refers mainly to an external force that surrounds and influences Japan, and the second is related to Japanese society and its demographics”.

Globalization has challenged the domestic-oriented Japanese labor market. During the period of accelerated growth, Japan was regarded as an economic model, whose most salient determinant factor was precisely its human resources that made possible the “Japanese miracle.” Moreover, being largely devoid of natural resources to fuel its growth process, Japanese human resources have been the force its postwar economic performance has rested on. In the last three decades, it is observed an urge for the internationalization of Japanese society, particularly of higher education. As globalized and well-educated resources are more demanded, Japanese government, in particular through the MEXT, states the importance of internationalization by introducing classes in English and promoting in-bound and out-bound international student exchange programs (“300,000 International Students Plan,” aimed at accepting 300,000 international students by 2020; “Global 30,” whose main purpose is to develop 30 universities as centers for internationalization; “Top Global University Project,” that supports 30 universities that have the potential to be ranked in the top 100 in world university rankings, and therefore can lead the internationalization of Japanese society; and “TOBITATE! Young Ambassador Program” a Japan Public-Private Partnership Student Study Abroad Program).

Along with this internationalization process and following the same direction of other advanced countries’ changes in higher education, it has also been observed a universalization trend, as the percentage of students enrolled in universities, junior colleges, colleges of technology and specialized schools is around 80%. However, differently from other advanced nations, there is a gradual privatization in the Japanese educational system, that intensifies at higher education, in which private universities accounts for approximately 80% of all universities and have around 80% of all university students on their registers. On the other hand, national universities have been reorganized as corporations since 2004, aiming to improve each university’s independence and autonomy to enhance education and research activities.

### ***Malaysia: National Higher Education Strategic Plan***

The National Higher Education Strategic Plan considers both the Malaysian Education Blueprint for Higher Education MEB (HE): 2015-2025 and the Graduate Employability Blueprint GE Blueprint: 2012-2017. With reference to the higher education, Malaysian higher education system has grown over the past few decades, gaining in student

enrollment, improving its global recognition on key dimensions such as research publications, patents, and institutional quality, as well as becoming a top destination for international students. These achievements were possible thanks to the steer and innovation of the Malaysian academic community, the support of the private sector, and the government efforts. Nonetheless, the Ministry of Education has recognized that the system will need to keep evolving to stay abreast with the main global trends. For instance, disruptive technologies such as advanced robotics, the Internet of Things, and the automation of knowledge work are expected to dramatically reshape the business and social landscape from what it is today. Preparing Malaysian youth to thrive in this complex and ever-changing future requires an equally fundamental transformation of Malaysian higher education system and higher education institutions. Consequently, in 2013, the Ministry of Education began developing the Malaysia Education Blueprint 2015–2025 (Higher Education). Over the course of two years, the Ministry drew on multiple sources of input, from Malaysian and international education experts, to leaders of Malaysian institutes of higher education and members of the public. The result is a blueprint that was developed by Malaysians, for Malaysians, and that will prepare Malaysia for enter the selected group of high-income nations. ((Ministry of Education Malaysia, 2015).

According to the Ministry of Education of Malaysia, as a fast growing and open economy, Malaysia faces the challenge of a more competitive employability landscape and the increased need for 21st century skills, especially for higher education graduates, which remains a cornerstone in Malaysia's development. Likewise, the Minister of Education considers an additional issue regarding to differences between employability and employment. Employment is defined as the potential to secure a job at a workplace while employability is defined as the potential to secure, maintain, and grow in a particular job at the workplace. Therefore, it is crucial for the industry and the university to understand the importance of these two terms in order to enhance graduate employability in Malaysia. (Ministry of Higher Education Malaysia, 2012).

The literature suggests that employability is the ability of being marketable in the industry. In other words, employability is about being adept at getting and keeping a fulfilling job. It is about the potential of obtaining and building a fulfilling career through continuous development of skills that can be applied from one employer to another; it is about possessing the sets of attributes and skills that match those required by industry; it is about taking the responsibility for self-development through learning and training, (close to the human capital theory), either through the employer or self-initiatives; it is about adopting the concept of life-long learning and; it is about being employed according to their level of qualification, functional competencies and being awarded accordingly in terms of their wages and benefits. While employment: It is a contract between two parties - one being the employer and the other being the employee. (Ministry of Higher Education Malaysia, 2012).

The Ministry of Higher Education of Malaysia (2012) through the GE Blueprint: 2012-2017 concludes that "the subject of graduate employability in recent years has become an issue of concern." The publication of this Graduate Employability Blueprint, the result of many months of deliberation and discussion by key representatives from

academia, public sector and entrepreneurial sector, is timely fortunate to say the least. Prospective employers complain that graduates from higher education lack the prerequisite attributes, as more than 50% of fresh recruits are deemed to be unsatisfactory in English communication skills, and yet, many of these young, inexperienced job-seekers expect unrealistically high starting salaries. On the other hand, some institutes of higher education blame employers for their reluctance to invest money and time in staff training and development. Caught between these two arguments, some institutes of higher education fail to recognize their shortcomings and their graduates' employability rates remain poor or unimproved. All parties involved in the preparation of future employees and those involved in hiring personnel, should have their finger on the pulse of the current employment market; being aware of the supply-demand equation and knowledgeable of the realities of the real working world.

### ***Higher Education in Mexico according to sectoral programs***

The Sectoral Education Program refers to the third constitutional article in which it is established that public education in Mexico is secular and free, moreover under the constitutional reform of February 2013, education quality must be ensured (*Diario Oficial de la Federación*, 2013).

Today, Mexico faces an international situation that poses the challenge of being inserted properly into the globalized world, which is experiencing a rapid advance of knowledge that it had been unexpected in the past. The country's development in the coming decades will depend largely on its ability to meet the challenges that the knowledge society poses (*Diario Oficial de la Federación*, 2013).

Sport, culture, science and technology should be strengthened as part of the educational effort as a whole, through the involvement of specialized bodies in each of these areas: The National Commission of Physical Culture and Sport (CONADE, in Spanish), the National Council for Culture and Arts (CONACULTA, in Spanish), the National Council of Science and Technology (CONACYT, in Spanish), respectively (*Diario Oficial de la Federación*, 2013).

Taking into consideration the importance of the relationship of the different educational levels with the job market, the Sectoral Education Program considers that upper secondary education, higher education and job training should be strengthened to contribute to the development of Mexico. It seems to be close to Sen (1999), young people are formed to achieve the competences required for the democratic, social and economic advancement of the country. They are essential to build a more prosperous and socially inclusive nation and to achieve an advantageous insertion into the knowledge-based economy (*Diario Oficial de la Federación*, 2013).

Higher education is one of the main factors for a country's social, political and economic development. Today Mexico has a diversified and broad-national presence system of higher education that allows a great higher education coverage. Demographic issues are raising conditions for designing a proper public education policy (*Diario Oficial de la Federación*, 2013).

The Sectoral Education Program considers that in the quest to find greater consistency between education and the job market, the country has made various efforts

to provide relevant education, but still far to the social and economic requirements. The National Development Plan provides favorable conditions for progress in this direction. The importance given to productivity as a hub for economic development should lead to greater links between schools and social needs. Greater diversity of educational opportunities and new models of cooperation to facilitate learning, internships and employability should contribute to these purposes. The possibilities of such cooperation are larger in highly productive sectors that require greater use and development of knowledge. This effort should be complemented by labor market studies, monitoring graduates, and measurement of the extent of engagement and new forms for identifying acquired skills (*Diario Oficial de la Federación*, 2013).

As Mexico is attempting to be inserted favorably into globalization, the Global Value Chains (GVCs) strengthen the country's competitiveness. However, the operation and dynamics of GVCs is a challenge the Mexican government faces, especially pertaining to policies that allow GVCs to reap the benefits of this new form of productive organization that are translated into greater competitiveness, while avoiding protectionist policies that ignore the interconnected nature of global production processes and the need for international competition (*Gobierno de la República de México*, 2013).

Greater integration of the Mexican economy to GVCs has deep implications for the development of the economy and for rethinking higher education. This relationship as well as access to new export markets, and consolidation of those in which it already has, must be based on productivity, innovation, capacity building and human capital with generic competences that allow labor flexibility (*Gobierno de la República de México*, 2013).

Based on the above government guidelines regarding higher education in each country that consequently show an official posture toward the fit between graduate labor market and work-ready graduates' education, we can draw a comparison across these three countries, in dealing with the relationship of our concern: graduates' job-market demands and graduates' human capital supply. While there is a robust consensus pertaining to the challenged posed by the global economy for higher education policies, the responses from each country are very divergent. For the Japanese government, in order to cope with the globalization process, there is the need to parallel it to an internationalization process of the Japanese education at every level, but particularly at tertiary level, in which English education plays a pivotal role. In their educational plans, English education and gaining competences are closely intertwined, and associated with improving their international competitiveness and weaving creative innovation. English education is not equally emphasized in the official plans of Malaysia and Mexico. In spite the fact that English is widely spoken in Malaysia, as it is one of its official languages, prospective employers have pointed out that the English skills are unsatisfactory, which indicates that a great deal has yet to be done regarding English education in Malaysia. In Mexico, English education is not a higher education policy priority, according to the government. In this country, the official language is Spanish, which is a lingua franca shared with approximately other 20 countries.

For both, Malaysia and Mexico, higher education policies are connected with their export-oriented model, as higher education promotes higher international competitiveness. Their condition of being open economies and the Mexican

government efforts for the creation of Global Value Chains, point into that direction. In the case of Malaysia, the most striking achievement regarding higher education policies, is the creation of a Ministry of Higher Education (MOHE) that focuses not only on the immediate employability of the young graduates, but also in their long-term employability.

Great challenge in Mexico is to be inserted into globalized world, related to democratic and social competences, economic advancement of the country, greater linkage between higher education and job markets, employability and higher education internationalization; have to be considered especially by the recently presidential votation (July 2018).

### **Field study results**

Official sources in each country —the white papers from the Ministry of Education, Culture, Sports, Science and Technology, and Ministry of Health, Labor and Welfare for Japan, the National Higher Education Strategic Plan for Malaysia, and Sectoral Programs within the National Development Plan for Mexico— provide us with information on higher education policies and the specific measures framed within the general guidelines of each country policy. However, based on that information and the official statistics released by the government of each country is not possible to make a proper assessment of the impact of higher education policies. In order to address that gap, our research team elaborated a database to process the information we compiled from a survey, in which university professors and researchers, government officials and private sector managers were the respondents.

The survey and database have been applied and modified over approximately the last four years, from 2014 to 2017, so they better serve to the compilation and process of the information and ease the interpretation of the results, while allowing a more adequate comparison and detection of best practices that might be appropriate to implement by each country.

The three countries that served as field for collecting information are from the Pacific Circle: Japan, Malaysia and Mexico. The information collected can be considered a step further in our research, as it helps us identify variables and parameters that lead to the proposal of future actions. The methodology employed in this study is based on a modified questionnaire that was used in previous analysis (Rangel and Ivanova, 2012). The subjects, who were not randomly selected, were then contacted personally and by email asking them to participate in our survey. The subjects who accepted participate were sent a hard or soft copy of the questionnaire, and were given sufficient time to fill the questionnaire out at their convenience, or were personally interviewed, which parallels the methodology employed by Cogan (2004), and follows the main guidelines of the comparative method (Sartori, 2002). The questionnaire was designed to gather opinions of a select group of renowned academicians from universities, government officials and business executives in the three economies, that is to say, interviewees directly involved and concerned with the elaboration and implementation of national education policies. The goal of the questionnaire was to harvest quantitative and qualitative information about the subjects' knowledge of the existence of higher education policies and their perception of their effectiveness, particularly on issues related to the incorporation of

the young population in the labor market right after graduating from tertiary education. Consequently, the questionnaire also included open-end questions that permitted the interviewees to provide additional, or more in-depth comments. The survey participants were also asked about the application and coordination of higher education policies and to what degree they thought they promoted professional development and provided highly trained professionals, who can meet the needs of the private sector and contribute with research and development in the area of science and technology. The questionnaire was applied to 50 participants, and consisted of 37 items that were organized in the following clusters: 1) Subject Information, 2) Assessment of Higher Education Policies, 3) Assessment of Employment Policies, 4) Assessment of Economic Policies, and 5) Assessment of Science and Technology Policies (see annex).

Table 1 shows the results of the survey in the three countries with respect to national policies on higher education, particularly their current implementation along with their effectiveness measured by evaluating their outputs, their suitability in the international and domestic contexts, their pending issues to be developed in the near future, and their interconnectivity with other related areas.

First of all, according to the figures in Table 1 (following page), undoubtedly higher education policies have been implemented in each country, as most of the respondents agreed on their existence. However, their effectiveness was not so evident, particularly in the cases of Japan and Mexico, where the interviewees stated that the institutions of higher education were failing to deliver quality young graduates. On the contrary, the interviewees in Malaysia stated that there was an appropriate supply of quality graduates.

Secondly, the respondents were also asked about the suitability of higher educational policies to the domestic economic structure and to the current international economic conditions. According to our results, particularly Mexican higher education policies were perceived as very unsuitable for equally both, the Mexican economic structure and the international economic system, as overwhelmingly almost all (93% at both) the Mexican respondents harshly stated that educational policies in this country have been designed with no consideration to either the domestic economic structure or the international economic context. In Japan, there are more respondents who perceived that higher education policies were more unsuitable to the international economic conditions (67%) rather than for the domestic economic structure (47%). However, a high percentage (40%) also said that they did not know whether educational policies has gone along with the Japanese economic system. As for Malaysia, despite its respondents were less negative in their statements, the significant percentages reached by the negative answers indicate the existence of relatively less unsuitability compared with Mexico and Japan. 40% of the Malaysian respondents said that their country's higher educational policies were suitable for their domestic economy, but also an exactly similar percentage thinks completely the opposite, that there was no suitability at all. Regarding the education policy's suitability in the international economic context, there was some agreement (40%) of the Malaysian respondents who think higher-education policy suits the global circumstances. The three-countries' interviewees considered that their respective countries' policies in the area of tertiary education are not suitable for the domestic and international contexts, as they rate them negatively with high percentages



Table 1. Results in the Cluster of Higher Education Policies

Country	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9
Japan	Y 80%	Engineering and Technology	D	Analytics	N 47% Y 13% DK 40%	N 67% DK 33%	N 67% Y 27%	N 67% Y 13%	Y 34% N 33% DK 33%
Malaysia	Y 93%	Engineering and Technology, Management and Marketing	A	Problem solving	Y 40% N 40% DN 20%	N 53% Y 40%	Y 54% N 33%	Y 60% N 27%	Y 73% N 14%
Mexico	Y 93%	Engineering and Technology	D	Analytics	N 93%	N 93%	N 87%	N 60% Y 40%	Y 46% N 47%

Source: Elaborated by the authors, based on information provided by the field research.

Y = yes, N = no, DK = does not know, Adequate = A, Deficient = D

in the case of Mexico (93%), slightly high for Japan (47% and 67%), and approximately half (40%, 53%) in Malaysia, which shows that higher education policies are designed whilst disregarding the country's economic structure and the global economic dynamics, and therefore much has yet to be done in this field of action.

Thirdly, regarding specific areas of expertise or disciplines to be developed and emphasized in higher education, the interviewees in the three economies shared their concern on the need for more and better professionals in the areas of engineering and technologies, while Malaysian interviewees additionally demanded more human resources with managerial and marketing expertise. By the same token, interviewees expressed their concern on the lack of certain abilities and skills of young graduates that did not allow them to perform properly as new recruits when they entered the job market. While the respondents in Japan and Mexico pointed out to the urge to acquire analytical capabilities during college, Malaysian respondents said that the emphasis should be placed on solving-problem skills.

Fourthly, the degree of connectivity between higher education policies and other national policies, such as employment policies, economic policies and science and technology policies, which are also summarized in table 1, show the following results. Mexican interviewees expressed their concerns on the lack of relationship between higher education policies and other national policies, particularly employment (N=87%) and economic policy (N=60%). In Japan also the respondents rated negatively the relation between tertiary education policies and employment (N=67%) and economic (N=67%) policies, equally. The Malaysian respondents were the most positive of the three countries toward the alignment of higher education and employment policies (Y=54%), and higher education and economic policies (Y=60%). Regarding higher education policies and science and technology policies, Malaysian interviewees converged in the existence of a strong relationship (73%), while in Mexico and Japan this relation was not clearly perceived, as in both countries the percentages of the negative and positive answers were the same. In sum, whereas a low degree of integration between employment policies and higher education policies is perceived in Mexico, higher education policies and science and technology policies are considered to be highly aligned in Malaysia.

### **Final remarks**

In spite of being driven by their serious concern on human resource formation, crucial aspect for economic growth and development, the governments of Japan, Malaysia and Mexico have failed to deliver effective public policies for higher education. In the three countries, on varying degrees close to very divergent, both educational policies were undoubtedly aimed at supporting the private sector productivity and the creation of jobs opportunities by human capital formation of millions of young graduates from higher education institutions. Nevertheless, according to our findings, there is no strong evidence of higher-education graduates' work-readiness once they enter the job market. Particularly, in Japan and Mexico the labor quality offered by these young graduates is defined as deficient and lacking analytical skills. Likewise, in the three countries, there is a clear demand for human resources with formation in the area of engineering and technology, which is aligned with their governments' involvement in



creative innovation and catching up with new technologies, in which they can keep and build new competitiveness for a better insertion in the global economy. Higher-education policy in Japan, Malaysia and Mexico, seems to have been designed regardless of the country's economic structure or the surrounding international economic conditions, despite the three countries' governments through their official documents emphasized the importance of globalization, and in the case of Malaysia and Mexico, competitive building and innovation in a context of economic openness. Furthermore, in the three case studies in general, their respective governments do not succeed in robustly articulating higher education policy with other policies, such as employment or economic policies. Consequently, there is still a long way to go in the design and implementation of higher educational policy, which has to be congruently formulated with other policies, such as those related to employment, economy and science and technology.

The similarities and differences found in the results of the survey on higher education graduates' readiness for the job market and in the governmental policies that are intended to address this matter across the three countries can be analyzed in a larger and common context, as the three countries belong to the Pacific Circle, and other organizations such as APEC, TPP-11, FTAAP and UMAP. We believe that their evident commonalities call for a regional response, in which the open-economy model can be the axis for the design of education policy, in general, and higher education policy in particular, in a more articulate fashion with other sectors, such as employment and technology development policies. Coordinated actions among sectors can lead to visualize the human capital requirements of the entrepreneurial and academic sectors that operate under the main guidelines of the economic model designed and proposed by each government, in the regional context of the Asia-Pacific Region.

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## **Japanese Americans' Advocacy for Educational Equity in 1940 Hawai'i**

**Lois A. Yamauchi, Kelsey Matsu**

### **Abstract**

This study analyzed Japanese and Japanese American participation in 1940 Hawai'i to protest turning Ma'ema'e School, an elementary school, into an English Standard School. English Standard Schools were public schools that only admitted students who passed English language tests. Primary and secondary documents were used to describe the context and the perspectives of the families and communities. Bridging Multiple Worlds Theory suggests that individuals' family, community, and school worlds interact and influence school success (Cooper, 2011). The theory was applied to analyze how individuals crossed boundaries between their worlds. As Ma'ema'e School students primarily spoke Hawai'i Creole English and 75 percent did not pass English entrance exams, most would be displaced by the conversion. The case reflects the sociohistorical context of education in Hawai'i and the role of language as a tool to oppress those with less power. It also reflects the Americanization of Hawaiians and immigrant groups.

### **Japanese Americans' Advocacy for Educational Equity in 1940 Hawai'i**

This paper presents a historical case study focused on calls for equity and quality in public education by Japanese and Japanese Americans in 1940 Hawai'i. The case focuses on responses to proposed changes to Ma'ema'e School, an elementary school in Honolulu. We were interested in how the Nikkei, those of Japanese ancestry living in another country (Kojima, 2016), mobilized to have their voices heard when policies related to their children's education developed. We viewed these Nikkei as participants and consumers of education and focused on language equity and its effects on this marginalized group.

Beginning in the late 1800s, Hawai'i's demographics dramatically shifted with a large influx of Asian immigrant workers brought to work on plantations controlled by an oligarchy (Tau-Tassill, Menton, & Tamura, 2016). The oligarchy was comprised of five heavily interlocked agricultural corporations run by influential European Americans. At this time, King David Kalākaua ruled the Kingdom of Hawai'i. Upon his death in 1891, Kalākaua's sister, Queen Lydia Liliu'okalani, accended to the throne. In 1893, European-American businessmen illegally overthrew the Hawaiian monarchy and placed Liliu'okalani under house arrest. Hawai'i became a US territory in 1898, and its government was highly centralized with power resting with the same group of businessmen who overthrew the Hawaiian monarchy. The annexation of Hawai'i was in large part manipulated by the economic interests of the sugar plantation oligarchy. A centralized government allowed this powerful elite to enact policy that maintained their control of the island's economics and promoted their interests.

## **English Standard Schools**

The European-American elite used a centralized school system in Hawai'i to "dictate . . . what were appropriate beliefs and activities of the people" (Benham & Heck, 1998, p. 137). Many policies suggested subtle and not so subtle racism toward Hawaiians and those from immigrant backgrounds. In 1924, the Hawai'i Department of Public Instruction, essentially run by this elite group, designated certain schools as English Standard Schools, enrolling only those students who passed an oral English exam. Older children were also required to pass a written English language test (Tamura, 1996). The goals of English Standard Schools were twofold. They reassured English-speaking parents that their children would not be held back in their education because of non-English speaking children. They also assured that children of English-speaking parents did not learn the Asian values and behaviors of their non-English speaking counterparts (Hughes, 1993).

During this time, the majority of students in public schools were Japanese, Chinese, Hawaiian, Part-Hawaiian, and other non-White ethnicities. Many students spoke Hawai'i Creole English, known colloquially as Pidgin or Pidgin English, and were unlikely to pass the English Standard School entrance exams. Hawai'i Creole English was the first language of children of immigrants as well as many native Hawaiians (Tamura, 1993). It was the language that developed on the plantation fields as a rudimentary form of communication amongst the multiethnic and multilingual workers (Young, 2002). By segregating students based upon their command of Standard English, in most cases, a second-language for these students, the English Standard School system reinforced a socioeconomic and political system segregated by race and class. However, no visible resistance against the system arose until 1940 when parents at Ma'ema'e School were informed that their school would be converted into an English standard school.

In general, education in the 1930s to 1960s reflected an Americanization of Hawaiians and immigrant groups through policies designed to promote US values and culture (Benham & Heck, 1998; Tamura, 1993). Public school educators sought to replace students' first languages with Standard English and promoted the learning of American issues over local cultures and affairs. The majority of the Ma'ema'e School children and their families were Hawai'i Creole English speakers, so turning the school into an English Standard School would displace most children in attendance. Although there were other ethnic groups involved in this case, we focus on the Japanese-American families who represented the majority at the school, and examine the influence of the broader sociohistorical context of their lives at that time.

## **Theoretical Framework**

Applying Bridging Multiple Worlds Theory (Cooper, 2011), we considered how individuals crossed boundaries between their home, community and school worlds. We looked for what and who mediated these crossings, including community members who acted as cultural brokers to assist access and facilitate change. We also considered barriers to families' participation in education and the effects of their status in society, relative to other groups that tended to have more power.

Bridging Multiple Worlds Theory is also consistent with our analysis of the development of identities within the broader sociocultural context (Cooper, 2011). Traditionally, scholars viewed the development of identity as an individual achievement with the goals of independence and autonomy. However, Cooper (2011) pointed out that evidence suggests that identity development is an “intergenerational project,” strongly influenced by family and other community experiences. From this latter perspective, the goals of identity development may include both individuality and connectedness to family and community.

## **Methods**

We analyzed 63 primary and 41 secondary documents to describe the context of the case and the perspectives of the families, communities, and school personnel. These documents included government documents, newspaper accounts, policies, and testimonies. Our analyses focused on describing (a) the sociocultural and historical contexts, (b) ways in which individuals crossed boundaries to engage in activities that might influence change in policy, (c) the resources of the families, and (d) the barriers to their engagement.

## **Results**

The value of education for the Niikei can be traced back to the first Japanese immigrants to America. According to the US Census, native-born Japanese men born before 1895 came to America with educational attainment comparable to that of White men born during the same period (Hirschman & Wong, 1986). The educational levels of these Nikkei were considerably higher than those of Chinese and Filipino immigrants. Thus, education was a cultural value passed down from Japanese families even prior to coming to Hawai‘i. As such, families viewed the public school system as an access point for economic and social well-being of younger generations.

From the mid 1800s to early 1900s, the importation of plantation workers dramatically changed the demographic composition of Hawai‘i, increasing in particular, the Nikkei (Asato, 2003; Tamura, 1994). The Nikkei population in the islands increased steadily from approximately 60,000 in 1900 to 80,000 in 1910 (Asato, 2003). By 1920, there were 110,000 Japanese, about 43% of the total population of Hawai‘i. The Nikkei maintained strong cultural and community ties with one another, particularly through Japanese language schools. Japanese parents viewed language schools as a bridge between the language and cultural gap between them and their second-generation children. Tamura (1993) reported that the numbers of children attending Japanese language schools increased dramatically from about 1,500 in 1,900 to 7,000 in 1910, and 20,000 in 1920. Of all the Japanese students attending public schools in 1920, 98% also attended Japanese language school (Asato, 2003). The significant growth in numbers and the cultural unity of the Japanese posed both an economic and political threat to the elite Whites in power.

The Japanese plantation workers began showing their economic strength and unity through their actions, such as organizing the 1909 and 1920 plantation strikes, the latter of which achieved intergroup solidarity among plantation workers of all ethnicities

(Asato, 2003; Tamura, 1994). Many plantation workers moved to the cities as soon as they completed their contracts, shifting economic structures (Dotts & Sikkema, 1994; Tamura, 1994). Politically, the elite feared that the Nisei or second generation Japanese who were American citizens, would become the dominant voting bloc in the territory (Asato, 2003). All these fears led to increased anti-Japanese sentiment and provided the impetus for the establishment of English Standard Schools.

By 1933, 96% of the islands' agriculture was securely in the hands of five companies, termed "the Big Five" (Tau-Tassill, et al., 2016). Missionaries, descendants of missionaries and White American and European businessmen founded the Big Five. These companies controlled "every business associated with sugar; banking; insurance; utilities; wholesale and retail merchandising; railroad transportation in the islands; shipping between islands and between the islands and California" (Daws, 1968, p. 312). They influenced territorial House and Senate appointees, and themselves sat on territorial boards that dealt with tax appraisals and land leases.

The influence of the Big Five extended beyond politics and economics into the social sector, including education, where decisions were made under centralized political control (Hyams, 1985). Missionaries founded many of the private schools as a means of educating their children separate from Hawaiians (Tamura, 1994). Between 1925 and 1940, 40% of White children, mainly from the upper class, were educated in private schools. After the annexation of Hawai'i, the White population increased, as more people came to the islands from the continental U.S. These middle class Whites did not have the means to support their children attending private schools and were afraid of their children adopting the culture and language of Asian and Hawaiian children in the public schools. It was pressure from these families that led to the creation of the English Standard Schools. By separating children by their English proficiency, the English Standard system effectively enforced a dual school system based on race and class, unofficially perpetuating discrimination based on race and socioeconomic status (University of Hawaii Legislative Reference Bureau, 1948).

Expansion of the US military was another pressure that led to the development of English Standard Schools. In 1940, the military increased its presence in Hawai'i, as a result, large numbers of Army and Navy families moved to Honolulu. Many of these families had elementary school-aged children, and this influenced the changes at Ma'ema'e School (Hughes, 1993; "Parents Demand," 1940).

On September 16, 1940, one week after school had already started, Superintendent of Public Instruction Oren Long announced the decision to convert Ma'ema'e to an English Standard School ("Maemae Pupils," 1940; "Maemae School," 1940). Long cited overcrowding at other English Standard schools, including two classes at Kapālana English Standard School who met in the school cafeteria and the teachers' lounge. For six years, Long said, School Commissioners had been considering establishing an English Standard school in Nu'uanu, where Ma'ema'e was located. According to Long, there were seven English Standard Schools in Honolulu, including five elementary schools, Stevenson Intermediate, and Roosevelt High School. There were also English Standard Schools on the islands of Maui, Moloka'i and Hawai'i. In comparison, there were over 30 schools throughout the islands that were not designated as English Standard



(“Pidgin English,” 1940). Long predicted that within 10-15 years, all schools would be English Standard, a goal toward which school officials strived (“Maemae School,” 1940).

According to Long, Maria Pi‘ikoi who had been the principal at Ma‘ema‘e for 18 years had been placed on leave until January 1, at which time she would retire (“Maemae School to,” 1940). The new principal of Ma‘ema‘e English Standard School would be Lorna Desha, who was the principal of Wai‘akea-kai Elementary School in Hilo (“Maemae School,” 1940). Two days later, Long announced that Desha declined the job and that Agnes Vance had accepted the Ma‘ema‘e principalship (“Mrs. Vance,” 1940). Vance was the principal of Ha‘aheo School in Hilo, and had taught in English Standard classrooms for several years.

On September 17, the day after the announcement that their school would become an English Standard School, the 220 children at Ma‘ema‘e School took the English language tests to determine whether they could stay at the school (“Too Much Haste,” 1940). Trained teachers tested the children individually, and tests were different for each grade level (“Long Announces,” 1940; “Maemae Pupils,” 1940). Older children wrote a composition, after which the teacher and the child discussed what was written to assess spoken English. The oral test continued with children reading an “easy story” and pronouncing 28 words and 7 numerals, which included sounds such as “th’s, long i’s, l’s and other vowels” (“Maemae Pupils,” 1940, p. 2). Children were also asked to change words from present to past and singular to plural. Teachers used picture books to assess younger children. *The Honolulu Advertiser* reported that teachers asked the children about the pictures and encouraged them to express themselves by talking about things familiar to them, such as their homes, pets, and hobbies. Younger children were then tested in “following directions and being able to determine what motions the teacher goes through” (“Maemae Pupils,” 1940, p. 2). Children were also asked to sing songs or recite verses and to write their names. The teachers noted mispronunciations.

On September 20, school officials notified parents about whether their children had passed the tests (“Long Announces,” 1940). Of the 220 students, 75 percent failed and would be transferred to other schools, 1-2 miles away (“Maemae Pupils,” 1940; “Shifted Children,” 1940). Ninety children were assigned to attend Lanakila School, 30 to Pauoa School, and 60 to Kawānanakoa School (“Shifted Children,” 1940). The 50 children who passed the tests would stay at Ma‘ema‘e, joined by 188 students transferring from Lincoln and Kapālama English Standard Schools.

On September 23, within a week of parents being informed of the change, Ma‘ema‘e opened as an English Standard School, with six classes of students (“Senate Holdover,” 1940; “Shifted Children,” 1940). Parents were upset that their children were transferred to other schools outside their community. Over 100 parents protested at the school, congregating in the school office and filling the corridors, demanding, “We want our school back!” “We’ve been discriminated against!” (“Parents Demand,” 1940). Parents signed and circulated a petition, which they formally presented to Honolulu Supervising Principal Harold Loper (“Shifted Children,” 1940). The parents argued that Ma‘ema‘e School existed to serve its community and that their young children should not have to walk long distances to new schools (Board of Education, 1940). In addition, they asserted that it was the teachers’ responsibility to provide adequate instruction to

develop their children's English speaking and writing skills. A portion of the petition stated:

*any selective grouping of children classified according to their ability to speak and write the English language is unfair and entirely too prejudicial because it is the duty of your servants in these schools to train the young children in the manner of speaking and writing the English language correctly and not to penalize them merely because they are unable to satisfy a requirement of yours in regards to their ability in this phase. (Board of Education, 1940, p. 88).*

On September 23, Supervising Principal Loper met with a group representing the parents of the displaced children. Later that day, Loper and Honolulu Assistant Supervising Principal Robert Faulker met with all of the Ma'ema'e parents in the school cafeteria and explained that the change was made because of Ma'ema'e's falling enrollment and overcrowding at Kapalama and Lincoln English Standard Schools ("Shifted Children," 1940). Loper announced that children who did not pass the tests, but wanted a second chance, would be retested. Retests began that day and continued throughout the week ("Maemae Pupils," 1940). Loper said that those who were transferred to the other schools would be given intensive English instruction, with hopes that they could pass the test in June and could return to Ma'ema'e the following year. Parent Eleanor McClellan, who became the spokesperson for the displaced families, said, "You've given us a raw deal. We're American citizens and this school is for this community. We're going to do everything to get this school back for our children" ("Shifted Children," 1940, p. 1).

Later that afternoon, school officials met at the Department office to consider the parents' petition ("Long Announces," 1940). Those attending the meeting included Superintendent Long, Supervising Principal Loper, Assistant Supervising Principal Faulkner, Commissioners of Public Instruction Chair Arthur Dean, and O'ahu Commissioner Loy McCanless Marks. The group decided that Ma'ema'e would continue as an English Standard School. On September 24, Long explained that there was a growing need for English Standard education, and it was a Department policy to create English Standard Schools "as a unit," rather than as schools-within-schools ("Long Announces," 1940, p. 2). He noted that it was not possible to have students from the overcrowded classrooms at Lincoln and Kapalama to attend Lanakila or Kawānanakoa, where there was space and where displaced Ma'ema'e children were being sent.

Some parents, whose children were transferred into Ma'ema'e from other English Standard Schools, were also unhappy with the decision to move their children after school started ("More Kicks," 1940). They asserted that their children had already adjusted to teachers at their former schools. These parents also noted unfair criticisms directed at them, particularly from Japanese newspapers, for a decision that was beyond their control.

Some of the Niikei families did not oppose English Standard Schools, so much as they resented the timing of the change at Ma'ema'e School ("Maemae School May,"



October 9, 1940). They protested not being given adequate notice about the English language examinations. Those families asserted that if they had been given a year to prepare their children for the tests, they would not consider the change to be unfair.

The Ma'ema'e parents met at the Ma'ema'e Sunday School building on September 25 and appointed their own committee to draw up a resolution articulating their position against the school conversion ("Maemae Parents," 1940). The committee included Chair McClellan and Members Matthew Keli'i, "Mrs. William Schubert," John Meyer, Tokuchi Amii, Peter Cummings, William Marks, A. G. Hottendorf, and Florence Yoshimoto. As a resistance statement, 50 parents agreed to keep their 72 children home from school until the situation was resolved. One parent noted, "If we send our children even for a short time to Lanakila, Kawānanakoa, or Pauoa as told by the school department, we would be weakening our stand" ("Maemae Parents," 1940, p. 1). The parent group decided to meet again to approve the resolution drafted by the committee.

Parents pressed for a meeting with Superintendent Long, Supervising Principal Loper, and Assistant Supervising Principal Faulkner ("Officials Offer," Sept 27, 1940). The school officials met with two groups of families on September 26, those whose children were transferred in to Ma'ema'e from other English Standard Schools and those who were transferred out. They discussed the possibility of establishing a "non-English Standard Division" at Ma'ema'e, composed of classrooms for first and second graders who did not pass the entrance examinations ("Non-English Standard," 1940). Some of the parents of children who had transferred into Ma'ema'e as an English Standard School expressed that they preferred to keep the school solely English Standard. Those in the group that represented families of displaced children said that this did not meet the needs of older children who were still forced to leave.

Staff from the two mainstream newspapers, *The Honolulu Advertiser* and *Honolulu Star Bulletin* suggested that although another English Standard school was needed, the decision to convert Ma'ema'e was unfair to families because of its timing and children having to walk long distances to their new schools ("One Hundred," 1940; "They Want," 1940; "Too Harsh," 1940; "Too Much," 1940). This contrasted with the responses by Japanese newspapers regarding the Nikkei position on the inequity of an English Standard School system that separated children based on English language competence.

The leaders of these publications were Nikkei who had more fully acculturated to America. The newspapers informed the Japanese community and, at times, challenged the island's institutional authority (Tamura, 1994). Founded in 1912 by Frederick K. Makino, the *Hawai'i Hochi* addressed issues facing Japanese Americans in Hawai'i. Originally from Japan, Makino was the son of an English merchant and his Japanese wife. Fluent in the English and Japanese languages, Makino actively sought to end discrimination against the Japanese in Hawai'i. He helped to lead the sugar strike of 1909 and challenged territorial laws abolishing Japanese language schools. Reflecting Makino's active involvement in social, economic, and political affairs, the *Hawai'i Hochi* responded to the Ma'ema'e School conflict directly. An editorial that drew much debate stated:

*We are glad to note that the parents of children who have been attending Ma'ema'e school and who are to be shuttled all over Honolulu to other schools just because they cannot make the grade in precision English speaking, have risen in their just indignation and protested against the rank discrimination of the school authorities closing the school to all but a few pupils who can pass the drastic test provided for the exclusive English Standard schools" ("Editorial," September 25, 1940).*

The *Hawai'i Hochi* not only gave full support to the resistance, but also continued to attack English standard schools, questioning their purpose.

*And for what purpose? To keep the diction of the Little Lord Fauntleroy's free and uncontaminated by the crude and vulgar dialect of the Tom Sawyers. To afford extra facilities and to place special stress in the teaching of English "as she is spoke" by the highbrow aristocracy. . . This is not democracy, it is rank discrimination. It is drawing distinctions based upon class, upon environment, upon social position and upon race—for these are the factors that in the past have been instrumental in determining a child's ability to speak pure and refined English." ("Editorial," September 25, 1940).*

A second influential publisher was Yasutaro Soga, editor of the *Yamato Shimbun*, which later became *Nippu Jiji* (Tamura, 1994). Like Makino, Soga was a voice that challenged discriminatory practices against the Japanese. He opposed political efforts to abolish Japanese language schools and foreign language newspapers. He argued for acculturation instead of Americanization, maintaining that good Japanese citizenship as well as Japanese language could exist alongside good American citizenship.

On September 30, Superintendent Long and Commissioners Dean, Marks, and Young decided that in addition to the six classes of English Standard students, 46 first and second graders who did not pass the English language tests could remain at Ma'ema'e School ("Maemae School Partially," 1940; "Parents Picket," 1940). Long announced that "the best possible teachers will be provided for these two classes" ("Maemae School May," 1940, p. 2) and special attention would be provided to help children pass the tests in June. Long stated that older children who did not pass the test could attend Kauluwela, Kawānanakoa, Pauoa, or Lincoln, as selected by their parents ("Maemae School May," 1940).

Not all parents accepted the compromise, and about 15 mothers left their workplaces to picket the territorial government building protesting the proposed solution ("Hearing Set," October 4, 1940; "Maemae Row," 1940). They carried flags and signs that read, "Down with Dual System Education," "District School Belongs to District Children," "Americanism is Education for All," and "Our Children Beautified Maemae School," ("Mothers Picket," 1940). The parents' spokesperson McClellan said that the picketing would continue until all children were allowed to return to the school, at least for the school year ("Maemae Parents Continue," 1940; "Maemae School May," 1940; "Parents Picket," 1940). She said, "We want all of our children back at Maemae. We should be

given until next June to help our children with their English. If by that time, they can't pass, then we are agreeable to let them go to other schools" ("Maemae Parents Reject," 1940, p. 2).

A Territorial Senate Holdover hearing convened on October 8 to present the opinions of both sides of the controversy ("Maemae Action," 1940, p.1). Senator Joseph Farrington conducted the hearing, assisted by Senators Francis Sylva, David Trask and William Heen. More than 100 people attended the hearing, including Ma'ema'e families and school officials, and representatives from both sides testified ("Maemae Action," 1940). Superintendent Long cited state law indicating that school officials were responsible for and authorized to establish and maintain schools in locations they deemed advisable ("Maemae School May," 1940). He denied that English Standard schools discriminated by race and pointed out that only 46.8 percent of enrolled students were White. Supervising Principal Loper stated that over the last 20 years, enrollment at Ma'ema'e declined from 400 students to 200, while enrollment at Lincoln and Kapālama English Standard Schools increased. According to Loper, enrollment in Honolulu elementary schools decreased over the last eight years, at the same time that of English Standard elementary schools increased. Loper noted that the Department had asked for more funds to build more classrooms, but were denied when a bond initiative that would have funded classrooms did not pass in the legislature ("Maemae School May," 1940). When asked why school officials waited until after school had started to make the change at Ma'ema'e, Loper said that it was due to the sudden vacancy by Principal Pi'ikoi ("Maemae School May," 1940).

Speaking on behalf of the Ma'ema'e families, Calvin McGregor said that the timing of the conversion was unacceptable ("Maemae School May," 1940, p. 11). He noted that school officials assigned the better teachers to the English Standard Schools, when the opposite should be the case ("Maemae School May," 1940). Long denied this allegation saying that assignment of teachers to English Standard and non-English Standard schools was equal. Other parents of displaced children testified that all students should be allowed to stay until June, upon which time they could be retested. One mother tearfully described the dangers her children faced as they walked to school in heavy traffic. At the meeting's conclusion, Senator Farrington asked school officials to reconsider their change of Ma'ema'e into an English Standard School.

On October 14, Superintendent Long announced that after considering the Senate hearing deliberations and talking with community leaders and parents, School Commissioners decided that Ma'ema'e would remain as an English Standard school ("Board Decides," "Third Grade," 1940). However, children in Grades 1-3 who did not pass the test, could remain in an annex of the school. Ma'ema'e parents met that night and on October 17 to discuss the decision.

On October 17, about 35 Ma'ema'e families met at the Ma'ema'e Sunday School and decided to draft a petition to be signed by all displaced families to appeal their case to the Territorial Governor Joseph Poindexter ("Maemae Parents Circulate," 1940; "Maemae Parents Plan," 1940). Spokesperson McClellan said that whereas, they previously asked that students be allowed to return for the rest of the school year, parents were now determined to change Ma'ema'e back to a non-English Standard school ("Maemae Parents Plan," 1940).

At the meeting, parents decided that children who were being kept home in protest should return to school (“Maemae Parents Plan,” 1940).

The Ma‘ema‘e families retained the assistance of legal advisers, Benjamin Kong and Calvin McGregor (“Governor’s Hands,” 1940). On November 27, McGregor and Kong presented Governor Poindexter the parents’ petition requesting that Ma‘ema‘e School be restored as a non-English Standard School. They cited Section 706 of the revised laws of Hawai‘i that stated that the Governor must approve all rules and regulations of the Department of Public Instruction before they could take effect. McGregor noted that if the Governor had approved the Ma‘ema‘e action, he would have “violated Section 154 of the 1939 session laws that requires public hearings on all rules and regulations having effect of law” (“Governor’s Hands,” 1940, p. 7). Further, the law required newspaper notifications of hearings at least four days prior to them. Kong said that the parents were not objecting to the English Standard, but to the “undemocratic methods which were used in converting Maemae overnight to fit the ends of the commissioners” (“Governor’s Hands,” 1940, p. 7). Poindexter responded that he had no jurisdiction over the Department of Public Instruction, but that he would pass the petition onto the Department with recommendations that they consider it. “If I tried to meddle in that department’s actions, officials there could tell me to go jump in the lake—and I’d have to do it,” Poindexter joked (“Governor’s Hands,” 1940, p. 7).

In the end, the Department of Public Instruction held its position, retaining non-Standard English classes for only Grades 1-3. Despite parents being only partially satisfied, this case demonstrated the effect of Nikkei resistance to and challenge of existing educational policy. This was particularly significant as more than half of the parents who signed the original petition were Japanese or part-Hawaiian (Board of Education, 1940); and yet, they were able to challenge educational policy influenced by the elite White oligarchy.

### **Influence of the Broader Sociocultural Context**

Culture is integral to how individuals develop and navigate among relationships and within varying institutions and communities (Cooper, 2011). With the threatening escalation and empowerment of the Japanese population during World Wars I and II, when dramatic patriotism was sweeping across the territory, “Buddhist temples, Japanese language schools and newspapers, and dual citizenship, all irritants to Americanizers, became major targets of discrimination” (Tamura, 1994, p. 213). The very resources that abetted Japanese cultural unity came under political fire. Those in power recognized that cultural resources could act as powerful mobilizers, and thus, they exerted effort to shut down culturally associated institutions, specifically those that promoted Japanese language, culture, and community. Amidst political attempts to squelch the culture and unity among the Japanese, one cultural value that remained strong among families was the value of education.

### **Resources of Families**

Bridging Multiple Worlds Theory focuses on the resources individuals and communities bring to challenging situations (Cooper, 2011). The second generation Japanese-American parents saw education as a means to achieve economic mobility (Dotts & Sikkema, 1994) and understood that English Standard Schools would further maintain the status quo. They viewed the English Standard School system as a gatekeeper that separated English-speaking children from non-English speaking peers and kept non-English speaking groups from improving their socioeconomic status. For those parents whose children did not pass the English exam, the sudden and unexpected conversion of Ma'ema'e School to an English Standard School undermined opportunity and advancement. These parents protested the transition of Ma'ema'e School to an English Standard School. However, as stated earlier, some parents also saw English Standard Schools as an opportunity if their children could pass the English exam.

It was true that English Standard Schools separated and segregated the already stratified society. However, with effort, hard work, sacrifice and determination, all Japanese cultural values, some families also believed in the possibility of their children one day passing the English exams and thereby advancing their economic opportunities. Young (2002) cited an example of immigrant Japanese families organizing a kindergarten that focused on the development of Standard English with the goal of children passing the oral examination needed to enroll in Central Grammar School. In fact, by 1947, there were more Japanese students enrolled in the English Standard Schools than there were White students (Tamura, 1994). Thus, Japanese families brought with them a value for education, as well as a belief that success in education was determined not by one's race, but by hard work and determination. Japanese cultural and moral values placed an emphasis on perseverance and industriousness, with a strong belief that "nothing will come to fruition unless [one] studies or works hard and persistently" (Lebra, 1972).

### **Resources of Teachers**

According to the Bridging Multiple Worlds approach, students navigate within and across home, school, and community settings (Cooper, 2011). Educators and other adults can facilitate smooth transitions across worlds, by acting as cultural brokers. A closer look at the faculty working at Ma'ema'e School in June 1940 indicates that the majority of teachers were of non-White descent. All teachers, but one, had Japanese, Chinese, and Hawaiian surnames of Kang, Mahoe, Goto, Fukuda, Auyong, Hasagawa, Ing, Pi'ikoi, Kim, and Matsuki. The principal, herself, had a Hawaiian surname, Pi'ikoi. While it was not possible to directly inquire with those who attended the school in 1940 about this, we speculate that the staff could have acted as cultural brokers, bridging connections across families and school. With the transition to being an English Standard school, the entire faculty and staff at Ma'ema'e School with the exception of the secretary, were replaced with faculty and staff, including the principal, with White surnames, such as Perry, Frost, Kennedy, Brooks, and Vance.

## Discussion

### *Socio-historical Influences on Language Policy and Power*

The Ma'ema'e case reflects the socio-historical context of education in Hawai'i and the role of language as a tool to divide and oppress those with less power in society. After the Hawaiian monarchy was overthrown in 1893, the Hawaiian language was banned (Warner, 1999). The indigenous language had been a shared language among its residents and many foreigners who visited the islands for reasons such as trade (Higgins, 2010; Reinecke, 1969). After its ban, and with the increasing numbers of children of immigrants, Hawai'i Creole English replaced Hawaiian as the shared language of immigrants and other locals in the islands (Sato, 1985). The Ma'ema'e case illustrates the White elite's discrimination toward Japanese Americans by privileging the Standard English that the elite spoke over the Hawai'i Creole English of the working class.

Warner (1999) pointed out that the history of language policy in Hawai'i is similar to European colonizers' use of language policy to strip away the culture of indigenous peoples in Africa (Ngugi 1986). African writer Ngugi (1986) described language as a carrier of culture and the basis of identity development. The language of a people carries a shared history of memories that reflects the values through which individuals view themselves and their relationships to the larger world. Colonialization in Africa involved the deliberate devaluing of African cultures, including their histories, art, religion, and education and a simultaneous imposition of the language of the colonizing group. "Language was the most important vehicle through which that power fascinated and held the soul prisoner. The bullet was the means of physical subjugation. Language was the means of spiritual subjugation" (Ngugi, 1986, p. 9).

The Ma'ema'e case reflects the Americanization of immigrant groups and Hawaiians, as these residents were punished for speaking their first languages (Warner, 1999; Wilson & Kamanā, 2006; Romaine, 1999). Hawai'i Creole English became a marker of what was considered less sophisticated and useful, compared to Standard English, and Hawai'i Creole English speakers were viewed in similar ways. In more recent times, many in the islands continue to view Hawai'i Creole English as "bad English" (Romaine, 1999), and individuals often choose to speak Standard English, rather than Hawai'i Creole English, to avoid being labeled inferior or uneducated (Marlow & Giles, 2008). This persists despite scholars' recognition of Hawai'i Creole English as a unique language, and the growing body of literature written using the language (Kido, 2008). In addition, Hawai'i Creole English speakers acknowledge that their language is a strong marker of belonging to the local culture and that its use has covert prestige in expressions of solidarity with other speakers (Higgins, 2010).

### *Bridging Multiple Worlds*

The Nikkei navigated the boundaries between home, school, and for some, policy-making, viewing formal schooling as a means of advancing their collective goals. Japanese immigrants viewed public education as a way to promote their children's life achievements and emphasized this to their children (Tamura, 1995; Hyams, 1985). That some of the families protested against changing their school into an English Standard



school because they were not given sufficient time to prepare their children for the change, rather than as a protest of the change itself, speaks to the way these families viewed education as an opportunity for advancement in their new country. By 1947, there were more Japanese students enrolled in the English Standard Schools than there were White students (Tamura, 1994). Thus, Japanese families acquired a value for education, as well as a belief that educational success resulted, not from one's race, but from hard work and determination. Japanese cultural and moral values placed an emphasis on perseverance and industriousness, with a strong belief that "nothing will come to fruition unless [one] studies or works hard and persistently" (Lebra, 1972).

In 1940, the Nikkei did not yet have many positions of political power, but were beginning to build support through the organization of labor unions and by becoming citizens and voters (Hughes, 1993). They found resources amongst the more acculturated Japanese Americans, particularly in the case of Japanese language newspaper editors, who were outspoken critics of the policy to change *Ma'ema'e* into an English Standard school. These writers and community leaders can be viewed as cultural brokers for other Nikkei families, as they bridged the Japanese and American worlds and identities.

According to the Bridging Multiple Worlds Theory, students navigate within and across a multitude of social and institutional settings, from home to school to community settings. "Healthy development is fostered when youth network or bridge across their worlds, and when adults and institutional agents who appreciate this can foster these links as cultural brokers" (Cooper, 2011, p. 64). The fact that the Japanese were making internal strides in education by 1940 was evidence of their value of education. The Nikkei expressed values of familism, mutual support, and responsibility to their family and broader community. This is similar to studies of the values of other immigrant and ethnic minority groups (Cooper, 2011). Individual achievement honored the family and community, while failures reflected poorly on the group. For Japanese Americans, academic and professional achievements reflected on their families and were ways to thank their parents for their hard work and sacrifices.

### ***Engagement by Diverse Families in Education***

This study analyzed a case in the history of education in Hawai'i when culturally diverse families engaged in efforts to change the school system toward goals of social justice. Although there are many positive effects of families' engagement in their children's education, it is less common for diverse and low-income parents to be engaged in educational policy advocacy and decision-making (Smith, Wohlstetter, Kusin, & De Pedro, 2011). Compared to other peers, students whose families are more engaged in their education tend to have higher attendance and graduation rates, be more satisfied with school, score higher on achievement tests, and have fewer behavioral problems (Henderson & Mapp, 2002). Unfortunately, most teacher preparation programs do not prepare educators well to develop successful family-school partnerships (Bartels & Eskow, 2010). Teachers and school personnel can work to better include a more diverse group of families through actions at the classroom, school, and system levels.

Hawai'i is a unique place to consider diversity in education, as there is no numeric majority group (Native Hawaiian Data Book, 2011a). In 2018, Hawai'i had one unified



state-run school district, serving over 185,000 students and their families on seven islands (Department of Education, n.d.a). Similar to the ethnic make-up of the State in general, there was no ethnic majority represented among students, with the largest groups being Native Hawaiian (28%) and Filipino (21%) (Native Hawaiian Data Book, 2011b). Hawai'i is also the site of much language plurality. The 2010 Census indicated that approximately 25% of Hawai'i residents spoke a language other than English at home, including more than 16 Asian, Pacific Island, and European languages (Department of Business, Economic Development, & Tourism, 2011). However, inequities persist with immigrants, Native Hawaiians, and other groups with relatively less wealth and power, doing more poorly in school (Okamura, 2008).

There is evidence of progress in the State regarding acknowledgement of the benefits of multilingualism and language diversity. Hawai'i has two official languages, English and Hawaiian (Halagao, 2017). In 1987, the State Department of Education established Kula Kaiapuni, the Hawaiian Language Immersion Schools in the Hawai'i public schools (Department of Education, n.d.b). Instruction in K-12 Kaiapuni schools is conducted in the Hawaiian language and students can continue in higher education to receive advanced degrees in the medium of Hawaiian language at the University of Hawai'i. In 2016, the Board of Education adopted the Seal of Biliteracy, making Hawai'i the tenth state to award the Seal to students who demonstrate high proficiency in more than one language (Halagao, 2017). The Board also adopted a multilingual policy that calls for more diverse language programs that go beyond English-as-a Second Language, such as heritage language, bilingual education, and dual language programs. The policy also emphasizes the need for educators' effective use students' home languages and cultures as resources and support for multilingual families.

When diverse groups of families are engaged in the school system, they may learn about school values and procedures and may also influence changes in the school culture, as others appropriate families' perspectives of thinking and acting. Educators and policy makers may enhance social justice by increasing positive family-school partnerships with diverse families. Families sometimes do not feel welcomed by school personnel (Comer, 2004). Some adults who did not have positive experiences in school as children may avoid school as a place that they participate as parents (Lightfoot, 2004). Including more diverse families in school activities and educational decision-making enhances social justice. Educators can promote parents' engagement by making schools welcoming to all families and including them in decision-making about their children's education. Understanding these educational activities and the policies that contextualize them may assist educators in better designing schools and school systems to be more inclusive of all families, thus increasing educational outcomes of children.

### ***Limitations and Future Research***

As this was a historical case study, we were limited by the documentation available. We did not know anyone involved in the Ma'ema'e case, and we assume that most adults involved are no longer living. Relatively little was written about the case, and we could not find any scholarly papers on this topic, so we relied on newspaper accounts and a small book created by the school that described some details. These sources may have

precluded certain types of information.

Future research is needed to analyze other cases of diverse family engagement in public education in both Hawai'i and elsewhere to determine whether there are similar findings regarding what promotes engagement by such families. It would be helpful to develop case studies of other historical cases as well as contemporary cases. Contemporary cases would allow for interviews and observations of family-school partnerships that might reveal aspects of family-school partnerships that were not documented by newspaper accounts and other writings originally made for different purposes.

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## **New Zealand's National Education Assessment System: Education or Populism?**

**Noella Yoon, Elizabeth Rata**

### **Abstract**

The National Certificate of Educational Achievement (NCEA) is the main secondary school qualification in New Zealand. This paper uses a study of New Zealand's secondary school assessment system as a point of entry into examining the gap between what is claimed for the assessment system and what the results for students reveal in terms of intractable ethnic and socioeconomic differences.

### **Introduction**

Since its introduction in 2002, the New Zealand government has expressed confidence in the secondary school assessment system, the National Certificate of Educational Achievement (NCEA), as a way to raise students' overall achievement (New Zealand Qualifications Authority [NZQA], 2018a). The predecessor of the current government – the fifth National-led Government – made claims about growing rates of educational achievement in NZ. One of the measures to justify these claims was NCEA Level 2 achievement. This level, taken by students in Year 12, is considered to be the minimum qualification requirement for further study or vocational training, equipping students “with the tools they need to succeed” as they embark on adulthood (Parata, 2017, para. 4). A significant claim made for increasing success is that more Māori students are getting the “best start”, having made “outstanding progress”, evidenced by an increase in NCEA Level 2 attainment (Parata, 2017, para. 1, para. 4). The purpose of this article is to report on a study of these claims by one of the authors (Noella Yoon). The study's investigation of NCEA statistics revealed a complex picture of an equally complex interplay of ethnic and socioeconomic factors, which cast doubt on the confidence in increasing educational success expressed in the political statements over a number of years. Using statistics made available by the New Zealand Qualifications Authority, the study found a discrepancy between NCEA Level 2 achievement and University Entrance (UE) achievement between 2005 and 2017. While there has been an increase in NCEA Level 2 achievement, UE achievement has not shown the same increase. The study's identification of fundamental problems is in line with widespread dissatisfaction with the NCEA assessment system, so much so that in mid-2018, the current Labour-led Government initiated a national review of the system (NCEA Review Ministerial Advisory Group, 2018).

### The Problem

Since the introduction of the NCEA in 2002, achievement rates have increased significantly across all ethnic groups (Gordon, 2013). For example, of the 13,000 Māori students turning 18 years old in 2008, only 6,003 achieved NCEA Level 2 compared to 9,476 in 2015 (Parata, 2017). The increase in 3,500 students is commendable and one could say that the government had succeeded in “raising achievement for all students” as it intended to (Parata, 2017, para. 5). However, we argue that this claim of achieved intentions needs to be interpreted carefully. By 2016, doubts about the veracity of the claims concerning NCEA had become a matter of public concern attracting considerable media attention. In that year, the *New Zealand Herald* investigated rising NCEA pass rates by examining differences in achievement across ethnic groups and school deciles to conclude that there were inequalities due to subject choice (Johnston, 2016). In April 2017, another media article drew attention to the increasing gap (now 15.3 per cent compared to 6 per cent in 2013) between NCEA Level 3 achievement and UE achievement (Redmond, 2017). Both these qualification are sat by students in their final year of schooling (Year 13) and when compared, reveal a considerable difference in achievement according to ethnicity and socioeconomic status. (The difference between the two qualifications in terms of subject choice and academic level is discussed below.) Statistics using NCEA achievement rather than UE show that Māori educational achievement has increased. In contrast, the numbers of school leavers who gain UE show that the ethnicity and the socioeconomic gaps are resistant to improvement. This is illustrated in the following graphs.

**Figure 1: NCEA Level 2 achievement across all ethnic groups from 2005 to 2017 (NZQA, 2018b, 2018c, 2018d, 2018e, 2018f)**

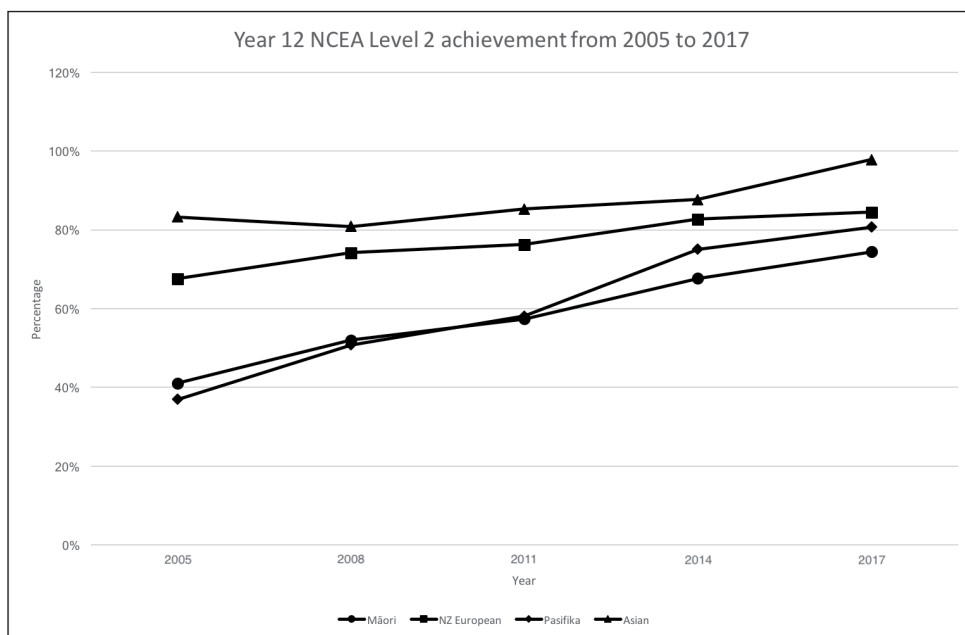
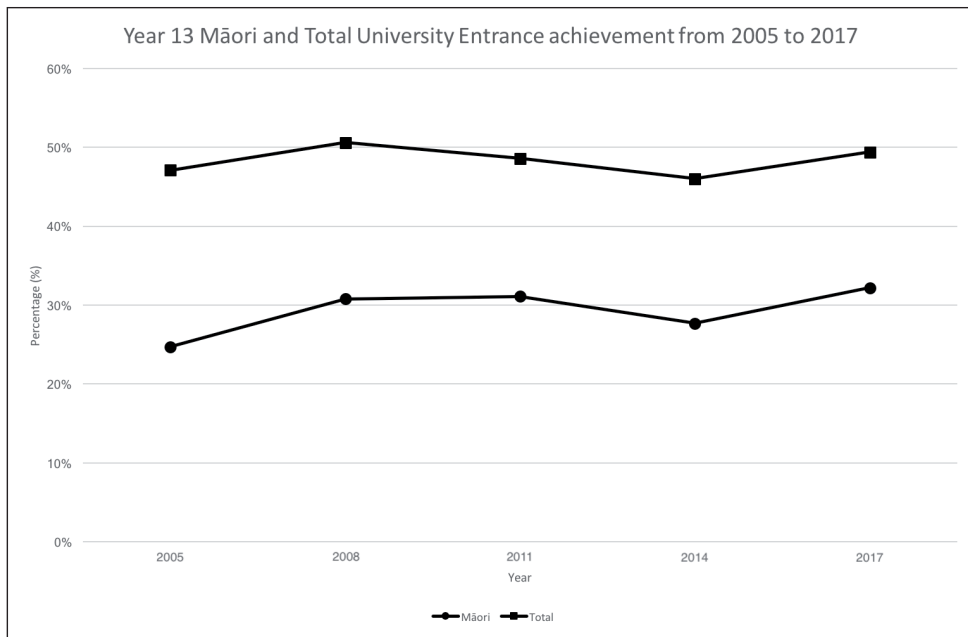




Figure 1 above supports the claim that NCEA Level 2 achievement has increased for all ethnic groups from 2005 to 2017. In 2005, 41.1 per cent of Māori, 67.6 per cent of New Zealand European, 37 per cent of Pasifika, and 83.3 per cent of Asian students achieved NCEA Level 2. In 2017, this increased to 74.4 per cent of Māori, 84.5 per cent of New Zealand European, 80.7 per cent of Pasifika, and 97.8 per cent of Asian students achieving NCEA Level 2. However, the statistics also show that while achievement has increased across the board, Māori students are still a considerable way behind other ethnic groups.

**Figure 2: Year 13 Māori and Total UE achievement from 2005 to 2017**

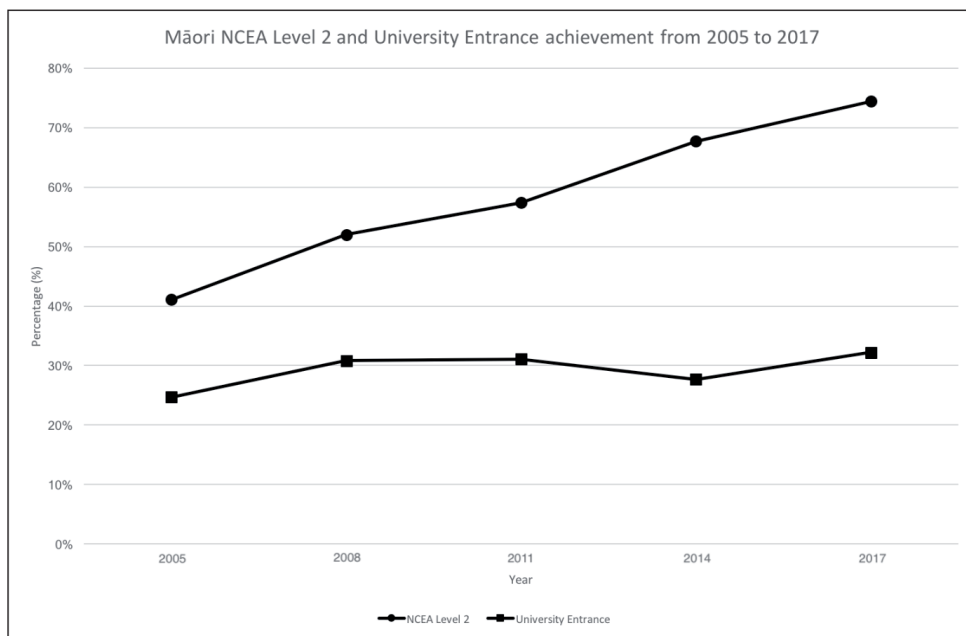


Additionally, the statistics comparing the combined UE achievement rate for Year 13 students from all ethnicities (total) show that Māori UE achievement is significantly below the achievement rate for all other ethnicities. (See Figure 2 [NZQA, 2018g, 2018h, 2018i, 2018j, 2018k].) In 2017, the total UE achievement for Year 13 students was 49.4 per cent.

Figure 3 shows that while Māori NCEA Level 2 achievement for Year 12 students has soared between 2005 and 2017, UE achievement for Year 13 students has not experienced the same increase (NZQA, 2018b, 2018c, 2018d, 2018e, 2018f). Rather, UE achievement has fluctuated and the gap between NCEA Level 2 achievement and UE achievement has increased. In 2005, 41.1 per cent of Year 12 Māori students achieved NCEA Level 2, and 24.7 per cent of their Year 13 counterparts achieved UE. In 2017, 74.4 per cent of Year 12 Māori students achieved NCEA Level 2, but 32.2 per cent of their Year 13 counterparts achieved UE. These statistics show such a huge discrepancy between Māori UE achievement and NCEA Level 2 achievement over nearly two

decades. This is despite claims by both politicians and the Ministry of Education that Māori students are achieving increased success at school. The remainder of this article examines the claim in light of the Level 2 – UE discrepancy.

**Figure 3: Year 12 Māori NCEA Level 2 and Year 13 UE achievement from 2005 to 2017**



### The National Certificate of Education Achievement

NCEA is the main secondary school qualification in New Zealand introduced by the New Zealand Qualifications Authority in 2002 (NZQA, 2018a). It is a standards-based school-exit qualification system comprising of three levels (1 to 3) registered in the New Zealand Qualifications Framework, typically worked through in Years 11 to 13 (Hipkins, Johnston, & Sheehan, 2016; NZQA, 2018a; Shulruf, Hattie, & Tumen, 2010).

A certificate at any level is gained by accumulating the required number of credits (NZQA, 2018a). For example, a student achieves NCEA Level 1 if they pass at least 80 credits (Hipkins et al., 2016). Credits are gained by achieving internally or externally assessed standards (Hipkins et al., 2016). There are more than 50 standards, each carrying between 2 and 6 credits, and covering a wide range of subjects. Subjects can be composed of achievement standards (traditional academic subjects aligned with New Zealand curriculum learning goals), unit standards (competency-based and aligned with technical and vocational training), or a combination of both (Hipkins et al., 2016). Courses combining material from different subjects and levels are referred to as ‘innovated courses’ (Rata & Taylor, 2015). Students can achieve certificate and course endorsement certificates at Merit or Excellence (Hipkins et al., 2016).

New Zealand Scholarship and UE are important qualifications but are not formally

part of NCEA. New Zealand Scholarship is aimed at high achievers and takes a traditional assessment approach with end-of-year examinations or portfolio submissions (Hipkins et al., 2016). UE is the minimum requirement to enrol in university in New Zealand, requiring NCEA Level 3 with 14 credits each in three UE-approved subjects, as well as 10 credits each in literacy and numeracy (Hipkins et al., 2016).

### **Origins of the NCEA system**

Educational policy in New Zealand underwent radical and comprehensive reform from the late 1980s (Openshaw, 2009). Fundamental changes were made to educational administration, to the curriculum, and to the assessment system (Hipkins et al., 2016; Shulruf et al., 2010). Prior to NCEA, New Zealand had a norm-based assessment system consisting of School Certificate, Sixth Form Certificate, and University Entrance, University Bursary and Scholarship (Hipkins et al., 2016). This system reflected students' achievement relative to their peers and operated on the premise that a fixed proportion of students would not be retained through senior secondary high school, thus only a predetermined proportion of students passed the end-of-year exam (Hipkins et al., 2016; Madjar & McKinley, 2013; Shulruf et al., 2010).

School Certificate was introduced as the school-exit qualification for Year 11 students in 1945 after the school leaving age was raised to 15 years (Hipkins et al., 2016; Openshaw, 2009). Due to the flourishing post-war economy, academic qualifications and university progression were not a priority for young people (Hipkins et al., 2016). The only examination system at the time was university-operated Matriculation so there were growing pressures to expand secondary education and remove university control over the curriculum (Gordon, 2013). School Certificate had strong market support and became the benchmark school leaving examination by the 1950s (Gordon, 2013; Openshaw, 2009). However, within a decade, it came under scrutiny; it was not operating as intended and its value had eroded (Openshaw, 2009). The secondary school retention rate had increased and by the mid-1960s, almost 90 per cent of school leavers sat the exam (Openshaw, 2009). Sixth Form Certificate was introduced as increasing numbers of students stayed at school for their sixth form year.

The 1970s economic recession brought a greater awareness of educational issues among the public and media (Openshaw, 2009). The 1940s secondary education reforms and the idea of equality of opportunity were seen by some to be a myth, and the education system – secondary education, in particular – was blamed for society's socioeconomic problems (Openshaw, 2009). There were growing pressures to examine the senior secondary assessment system to address the challenges presented by rapid social, cultural, and economic changes (Hipkins et al., 2016). These challenges included the changing nature of secondary schooling, globalisation, increasing diversity of New Zealand society, and the changing nature of work (Gordon, 2013; Hipkins et al., 2016). There were also concerns that educational standards were declining (Openshaw, 2009).

Senior secondary school retention increased over the years, partly for political reasons with the raising of the school leaving age, but primarily for economic reasons (Hood, 1998). Increasing requirements for entry into the labour market and a decline in opportunities for unskilled and semiskilled labour contributed to growing youth

unemployment in the decades following the 1970s (Hipkins et al., 2016; Openshaw, 2009). There was greater demand for young people to gain qualifications regardless of progression to university as schooling began to be seen as a means of gaining skills to increase employability (Hipkins et al., 2016; Hood, 1998).

Another reason for overhauling the assessment system was justified by arguments for greater equity in response to public outcry about the system's perceived bias against Māori, Pasifika, and low socioeconomic status students in the 1980s (Gordon, 2013; Hood, 1998). While the gender imbalance in school retention decreased throughout the years, the disparity between Māori and non-Māori increased (Hood, 1998). Despite the growing number of Māori students attending secondary school, few went on to gain School Certificate, and fewer entered Year 12 (Openshaw, 2009). For example, in 1982, 69 per cent of Māori students failed the School Certificate papers they sat, compared to 43 per cent of their New Zealand European counterparts (Gordon, 2013), leading to claims by some Māori intellectuals for an entirely separate Māori system (Openshaw, 2009).

The majority of School Certificate subjects were academic subjects such as English, mathematics, and science (Hipkins et al., 2016). With increasing secondary school retention of a diverse range of students, schools now had to cater to and prioritise the less academically inclined students (Hipkins et al., 2016). It was also argued that cultural needs were not addressed, a situation which may have negatively affected students' achievements throughout schooling (Shulruf et al., 2010). Furthermore, claims that the system failed to cater to the 'personalised learning styles' of students (a since discredited idea) contributed to the overall dissatisfaction with the assessment system (Riley, 2014).

According to Openshaw (2009), a political settlement by Left-liberalists and 'New Right' neoliberalists provided the conditions for a radical reform of the education system. There were calls for New Zealand to become a 'knowledge society', a slogan promoted by the OECD linking educated populations to successful economies (Hipkins et al., 2016). The neoliberal 'Tomorrow's Schools' reforms of 1989 radically changed the way the education system had been administered since the Education Act 1877 from a centralised and standardised national system to a decentralised and localised system (Codd & Openshaw, 2005; Openshaw, 2009). The New Zealand Curriculum and the New Zealand Qualifications Framework were introduced with the intention of adapting schooling to the rapidly changing world. The emphasis shifted from a focus on knowledge to skills in response to the belief that an education system focussing on knowledge acquisition rather than skill development was inadequate in keeping up with these changes (Hood, 1998). Curriculum and assessment were separated with the introduction of the New Zealand Qualifications Authority as an autonomous entity (McPhail, 2016). The New Zealand Qualifications Authority developed a new flexible qualification framework that was intended to cater to students' educational needs and to their vocational training needs (Hipkins et al., 2016).

### **Claims about NCEA**

NCEA was introduced in order to better support learning by enabling schools to be more flexible in catering to the needs of all students regardless of ability and background (Madjar, McKinley, Jensen, & Van Der Merwe, 2009; NZQA, 2017). It was intended to be

fairer with the aim of reducing the educational achievement gap across different ethnic and socioeconomic groups (Fitzpatrick, 2011; Shulruf et al., 2010). The long-term goal was for greater participation by all groups in society and to foster a culture of lifelong learning, goals that are re-stated in the recently established NCEA review (NCEA Review Ministerial Advisory Group, 2018). It offered students a greater range of study options with increased opportunities to develop skills, knowledge, and competencies in academic or vocational pathways (Madjar et al., 2009). NCEA advocates claimed that it was an innovative concept combining newer approaches with elements of previous assessment models (Hipkins et al., 2016). Despite these positive claims, NCEA has been controversial from the beginning, with ongoing problems of implementation and doubts about its success, all of which have contributed to the 2018 review of the assessment system (Alison, 2005).

From its inception, it was claimed that NCEA would successfully address the serious inadequacies of the previous system and address the learning needs of all students (Hipkins et al., 2016). However, 16 years later, inequitable educational outcomes persist between Māori and non-Māori, and across socioeconomic groups. In 2017, only 13.7 per cent of school leavers at decile one schools (those in the poorest areas) left school with UE. For those in the wealthiest areas at decile 10 schools, the percentage was 17.3 (Collins, 2008). Although the interplay of ethnicity and socioeconomic status is not the purpose of this article, it should be noted that the majority of students who identify as Māori attend schools in the most disadvantaged areas (Lourie & Rata, 2014). This means that there is considerable crossover between socioeconomic status and Māori identification. While NCEA seems to be meeting political objectives, it is leaving a large group of marginalised students at the bottom (Openshaw, 2009). Furthermore, dissatisfaction with NCEA has seen some secondary schools treating it as an inferior system by turning to alternative assessment systems such as Cambridge International Examinations (Fitzpatrick, 2011).

The government's 2018 review aims to improve NCEA to enable young New Zealanders to fulfil their potential and succeed (NCEA Review Ministerial Advisory Group, 2018). Over the years, there has been dissatisfaction with the reality of NCEA not matching up with its intentions. The New Zealand Qualifications Authority (2013) claims that due to reviews and refinement of NCEA since its initial implementation, there is transparency and NCEA results show a “rich and accurate picture of a student's skills and knowledge” (para. 17). However the very complexity of the system, one designed to enable greater flexibility, continues to leave many parents and employers unsure about students' achievement; a factor in the establishment of the 2018 review. The next section examines the extent of this complexity.

### **Assessment Complexity**

To meet the needs of a wide range of students with different academic abilities and interests, NCEA provides students with multiple pathways to demonstrate achievement, and teachers with flexibility and innovation in course design (Madjar & McKinley, 2013; Riley, 2014). This flexibility has made the system very complex for its stakeholders to understand and navigate the system effectively (Madjar et al., 2009; Shulruf et al., 2010). For example, parents (especially under-represented groups) find it hard to understand

the difference between alternative versions of subjects, standards within NCEA, implications of subject choice, and the UE qualification (Madjar et al., 2009).

Firstly, NCEA offers three types of courses in core curriculum areas: traditional-discipline, locally-re-designed, and contextually focussed (Madjar et al., 2009). Traditional-discipline courses are similar to those offered under NCEA's predecessor and are usually composed of achievement standards. Locally-re-designed courses cover less traditional curriculum content, use a mixture of unit and achievement standards, and sometimes incorporate standards from more than one NCEA level. Contextually-focussed courses are composed of mainly unit standards, offer fewer credits, make closer links to students' everyday life, and focus on achieving the requirements of NCEA rather than acting as a prerequisite leading onto the subject at a higher level (Madjar et al., 2009). This approach is underpinned by the belief that it will increase achievement across all ethnic and socioeconomic groups, particularly Māori students (Rata & Taylor, 2015). In reality, it acts as a streaming mechanism because it allows schools to offer different versions of subjects, with some designed for academically-able students wanting to progress to university, and others designed for students who are thought to do better with a more practical and applied knowledge of these subjects (Alison, 2005; Madjar & McKinley, 2013).

Secondly, NCEA has made available a wider range of subjects than ever before and recognises learning outcomes from both academic and vocational courses, with equivalent credits towards the same qualification (Jensen, McKinley, & Madjar, 2010; Madjar et al., 2009). This, coupled with the ability to accumulate credits for more than one year and through both internal and external assessments, has increased secondary school retention by giving an incentive for low achieving students or students who would have otherwise left school without any qualifications to stay at school (Hipkins et al., 2016; Madjar et al., 2009). However, this has also made it harder for stakeholders to navigate the system effectively to achieve their full potential. Students' subject choice is affected by various internal and external factors, one of which is needing to pass the 'subject pass' requirement at school to study the particular subject at a higher level (Jensen et al., 2010). Within subjects, students can also decide on how much content to learn and, in some cases, how to be assessed by choosing which standards and credits to attempt (Madjar et al., 2009; Madjar & McKinley, 2013). On the one hand, giving students this choice allows them to take responsibility for their learning. On the other hand, it opens up the possibility for students to make inappropriate choices, limiting their future study and employment opportunities (Alison, 2005; Madjar et al., 2009; Madjar & McKinley, 2013). For example, a student enrolling in applied mathematics at Level 2 cannot study calculus at Level 3, which closes the door to the Science, Technology, Engineering, and Mathematics (STEM) pathway (Madjar et al., 2009).

The UE requirement adds another layer of confusion to subject choices for students and parents (Madjar et al., 2009). It is crucial for students aspiring to go to university to pick subjects carefully – even as early as Year 11 (Madjar et al., 2009; Madjar & McKinley, 2013). To achieve UE, students need a particular combination of standards, mostly at NCEA Level 3, and across a range of subjects (for example, balancing science subjects with language-rich subjects) (Madjar & McKinley, 2013; Shulruf et al., 2010).



While all NCEA Level 3 subjects can contribute towards the NCEA Level 3 qualification, not all can count towards UE (Madjar & McKinley, 2013). The likelihood of obtaining UE increases with the number of UE-approved subjects studied (Madjar et al., 2009). However, not all standards from UE-approved subjects count towards UE (Madjar & McKinley, 2013). Students who choose or are directed into subjects that are applied versions of core subjects or composed of mostly unit standards early on in their NCEA journeys may find that they cannot qualify for UE in later years (Madjar et al., 2009). Students may also find that they meet the numeracy or literacy requirements for UE but fail to meet the ‘subject pass’ or other prerequisite requirements for UE and specific university degree programmes (Madjar et al., 2009).

### **Māori Educational Achievement**

Māori educational achievement under NCEA paints a clear picture of the tension between NCEA intentions and reality. The previous National-led Government’s Māori educational strategy ‘Ka Hikitia – Accelerating Success 2013-2017’ aimed for 85 per cent of Māori school leavers to achieve at least NCEA Level 2 by 2017. This would ensure that they would not be left behind and are able to reach their full potential (Ministry of Education, 2013). Although Māori NCEA Level 2 achievement remains relatively low, it has soared since 2005. However, a gap remains (Gordon, 2013). Why has UE achievement not shown the same increase?

As shown in Figure 3 (above), Māori educational achievement has increased between 2005 and 2017. However, the problem that it illustrates is that UE achievement has not shown the same increase as NCEA Level 2 achievement. In 2017, 56.7 per cent of Māori students achieved NCEA Level 3 but only 32.2 per cent achieved UE. This means that only slightly more than half (56.8 per cent) of Māori students achieving NCEA Level 3 in 2017 also achieved UE (NZQA, 2018f). This is a huge contrast to 2005, where 89.8 per cent of Māori students achieving NCEA Level 3 also achieved UE (27.5 per cent of Māori students achieved NCEA Level 3, while 24.7 per cent achieved UE) (NZQA, 2018g). There is clearly something going on beneath the rising achievement rates if the same students achieving NCEA Level 2 are not achieving UE.

### **Knowledge and NCEA**

In this section, we argue that a foundational problem is that NCEA does not distinguish sufficiently between academic knowledge and the type of sociocultural knowledge acquired from experience. This is the idea of knowledge equivalence where each type of knowledge is considered to be equal to the other, despite the fact that access to academic knowledge does provide opportunities to achieve at higher educational levels (Rata & Taylor, 2015). Additionally, there is a focus on skills and competencies rather than the ‘powerful’ knowledge found in academic subjects. The result is to reduce access for students to the knowledge required to proceed to higher educational levels (McPhail, 2016; Rata & Barrett, 2014; Wheelahan, 2010). The importance of access to such ‘powerful knowledge’ has been recognised in the NCEA review. Accordingly, “NCEA needs to make space for the powerful learning needed for success in further study, work, and life in the community” (NCEA Review Ministerial Advisory Group, 2018, p. 8).



However, the belief in knowledge equivalence which equates academic and non-academic knowledge has reinforced assumptions that academic subjects are either culturally unsuitable for some students or too difficult and de-motivating (Lynch & Rata, 2017; Rata, 2012). This may lead teachers to guide less able students into taking credits that they have a chance of passing, while more able students may lose the motivation to undertake the complex work required to understand increasingly more difficult ideas (Rata & Taylor, 2015). The knowledge equivalence approach has led to inconsistent content across subjects and schools, as teachers have flexibility in course design and are able to select content according to student interests and to whether they will receive NCEA credits (Madjar et al., 2009). By emphasising assessment and credit accumulation, NCEA is teaching students to pass, not to learn, with the variability in difficulty leading to 'credit manipulation' (Madjar et al., 2009; Rata & Taylor, 2015). This refers to students choosing standards which will give them 'easy credits' (Riley, 2014; Shulruf et al., 2010). For example, students could earn two credits at NCEA Level 1 with a unit standard (non-academic), which involves picking up litter, an activity justified under the requirement for students to "participate in a group or team to complete routine tasks" (Thomson, 2003, para. 3). 'Credit chasing' occurs when students are motivated by credits (Hipkins et al., 2016; Madjar et al., 2009). Here, students may choose to skip standards offering fewer credits or credits they do not need after meeting the requirements for a certificate, regardless of the importance of the content (Madjar & McKinley, 2013). While it appears that students are gaining qualifications, they are not gaining the knowledge they require to understand a subject and to proceed to the next level (Hipkins et al., 2016).

The term 'pedagogic populism' refers to practices whereby knowledge is made more accessible by diluting its academic rigour, or by directing students into what are known as 'innovated courses' (Madjar et al., 2009; McPhail, 2016; Rata & Taylor, 2015). These are courses which mix academic and non-academic content. Although the intention was to create greater flexibility, the practice of conflating types of knowledge in this way may contribute to unequal 'opportunities to learn' for different schools, ethnic groups, and socioeconomic groups (Wilson, Madjar, & McNaughton, 2016). According to Riley (2014), conflating subjects also creates a false sense of improvement in students taking 'easier' versions. In lower decile schools especially, the focus is on ensuring that students achieve NCEA Level 3, rather than UE (Shulruf et al., 2010). The 'innovated courses' are designed with various combinations of content and standards that are different to the specific subjects required for UE. Therefore, students who study the innovated or mixed courses are disadvantaged compared to those in schools that aim for their students to achieve UE (Shulruf et al., 2010).

Irrespective of academic ability, many Māori students find it harder to navigate the NCEA system to their best advantage. This is because they have less cultural and social capital relative to their counterparts who are from a different ethnic group or higher socioeconomic background, or have university-educated parents (Madjar et al., 2009; Wylie & Hipkins, 2006). Parents value education in the hope that it will enable social mobility but also find it hard to navigate the system to help their children. Consequently, they encourage 'credit chasing' (Madjar et al., 2009). In addition, many Māori students

are less likely to take academic subjects or pathways, quality teaching, and UE-approved subjects as early as Year 11 (Madjar et al., 2009; Wilson et al., 2016). The ‘Competent Children, Competent Learners’ study found that Māori students were more likely to be unhappy with subject choice and indicated they would have liked more guidance (Wylie & Hipkins, 2006). With inadequate guidance, students are more likely to make subject choices affected by peer influences and personal interest, rather than future aspirations (Madjar et al., 2009). It is these students that are more likely to reach a dead end in study options later in their NCEA journeys and have lower levels of motivation, focussing on the bare minimum rather than doing their best (Madjar et al., 2009; Wylie & Hipkins, 2006)

### Conclusion

According to its advocates, NCEA is an evolving system that is still a work in progress, characterised by ongoing tension between the intentions and reality (Hipkins et al., 2016; Madjar et al., 2009). To its critics, flexibility has been achieved at the expense of meaningful educational achievement (Riley, 2014). While its intentions are clear, NCEA seems to focus on increasing pass rates and qualification attainment rather than addressing the questions of what students were learning and why (Hipkins et al., 2016). The study upon which this article is based asked about the meaning of increasing educational achievement and qualifications if it does not result in more equitable educational outcomes. Despite the claims that NCEA has, in fact, succeeded in raising the educational achievement of students in disadvantaged areas, particularly for Māori students, our analysis of the gap between NCEA Level 2 results and UE results suggest that this is not the case. We have identified the belief in knowledge equivalence with the conflation of academic and non-academic knowledge as one of the main contributors to the problem.

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