SELECTED READINGS IN EDUCATION

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Madalitso Khulupirika Banja

Editor

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Dedication

This book is dedicated to all Zambian students often starved of academic learning materials that reflect their own environment and circumstances, and to all novice lecturers who have believed the lie that they are not good enough to contribute anything worthwhile.

Acknowledgements

First and foremost, I am extremely and forever grateful to God Almighty for His divine providence and grace that has enabled me to undertake this huge task. I also wish to express my profound and unreserved appreciation to my colleagues in the Department of Educational Psychology, Sociology and Special Education for the encouragement I have received in my writing pursuits. Particular thanks to Dr Beatrice Matafwali and Dr Ecloss Munsaka.

My special thanks go to my niece Towela and my son, Chisomo for the help rendered in typing some of the work.

My sincere thanks also go to the following: Freda Wolfenden and the Distance Education for Teachers in Africa (DETA) for permission to reproduce the article titled, ' Supporting Induction to the Teaching Profession for Women in Malawi; the Finnish Education Research Association (FERA) for permission to reproduce the article titled; Making Mentoring a tool for Supporting Teacher's Professional Development,' and Dr John Rodrick Luangala and the University of Zambia Press (UNZA Press) for permission to reproduce the article titled, A Reading Culture in Zambia: An Alternative Explanation of its Absence'.

I wish to thank also the various contributors for their professional contributions to the world of academia. Their response and participation has already paved way for the publication of volume two which is already under way. My other thanks go to all the people who surrendered their time to review the various drafts and providing the authors with valuable comments. They offered insightful comments on the manuscripts submitted for publication. As Christine Inglis has observed in her editorial of *International Sociology, 30(3) 2015*, reviewers of articles are rarely appreciated by the institutions for which they work. In the case of this publication, reviewers did all the good work on a voluntary basis. And yet without them, the quality of the work would have been greatly compromised. My thanks also go to the University of Zambia Press (UNZA Press) for the final editing of the contributions, the design of the cover, and the layout of the publication; and Litovia Limited for their professional printing service.

To you all, I am highly indebted. May the Almighty God abundantly bless you.

Madalitso Khulupirika Banja
Lusaka
April, 2017

Introduction

This publication grew out of a deep-rooted two-fold desire; firstly, to contribute to the local literature for students, for there is an unprecedented proliferation of higher institutions of learning in our country today. Secondly, to provide an avenue for academic and general staff within educational circles to document and share their scholarly ideas related to their practice. Having published two books earlier and interacted with colleagues at various levels, I feel duty-bound to continue publishing so as to stimulate others who may be thinking of publishing but are lacking the confidence to do so because of various inhibitions. I, therefore, sense a professional obligation to contribute to the academic discourse. My experience though, is that publishing is like building a house; unless and until you lay the first block, you will never build any.

After twelve years of university teaching, I have the honour to bring together in this volume academic discourse from a diversity of academic perspectives from African and European scholars. Considering that Africa is said to contribute decimally a small percent to world publications, each of the African contributors to this volume have every reason to be particularly proud of themselves.

The book presents standalone chapters, and each chapter discusses a particular theme in education. It presents some of the most topical but sometimes most ignored issues in education.

The book provides needed information in eleven chapters and gives relevance and practical application not only in Zambia but in other parts of Africa, and the world at large. This is made possible not only by the global nature of the discussions, but also by the mere fact that some of the chapters reflect scholarly work from Nigeria, South Africa, Malawi, Zambia and Ireland; thus bringing to the discussion a rich milieu of knowledge and experiences. The interpretation of the different issues by the authors is likely to provoke healthy discussions. The book contributes in many important ways to our understanding of different issues in education and is structured as follows: *Chapter 1* on *Curriculum Re-engineering and Development in Zambia: the Sociology of Education in the Face of Globalisation,* provides philosophical introduction to the entire book and enables the book to find relevance and practical application across disciplines not only in Zambia but in other parts of Africa, and the world. It combines discussions on Curriculum Issues, Sociology of Education and the relatively new concept of Globalisation.

Chapter 2 is titled, *The Sociology of Education; Major themes and their Relevance Past, Present and Future.* It should provide a special appeal to students of education, educationalists, policy makers as well as general readers concerned about what teachers learn during their training, and how they practice it in the classroom and school. Using the rich experience of casual observation,

detailed and analytical review of existing literature and empirical data, the authors produce a chapter anchored on experiential knowledge and systematic, objective interpretation and analysis.

Chapter 3 is titled, *Group process and the Sociology of Counselling Clients.* And, *Chapter 4* is titled, *Childhood: Theoretical Perspective and Socio-Cultural Construction*. This chapter argues that teachers ought to always bear in mind that they carry a huge responsibility of turning young children into responsible adults. They must realise that the behaviour of pupils is directly or indirectly linked to their own behaviour. Part of this task entails being an all-round role model apart from teaching reading, writing and arithmetic.

Chapters 5, *6* and *7* deal with *issues of teacher induction and mentoring*. These three chapters are timely as they deal with an often neglected aspect of the education system particularly in Africa. These chapters titled, *Mentoring as a tool for quality assurance in teacher education: the case of Zambia*, '*Supporting induction to the teaching profession for women in Malawi*', and *Making Mentoring a tool for Supporting Teacher's Professional Development*, provide a compelling argument for the need to assist Newly Qualified Teachers settle in their new work environment as a way of helping them attain competence in their practice. *Chapter 6* also introduces a gender perspective to the discussion on induction in the teaching profession.

Chapter 8 deals with *Language-in-education Policy and Linguistic Diversity in Zambia: An Alternative Explanation to Low Reading Levels among Primary School Pupils* and Chapter 9 *A Reading Culture in Zambia: An Alternative Explanation of its Absence* deals with issues of language and language policy in Zambia. Zambia, and Africa in general are still grappling with resolving issues of L1 versus L2. However, beyond the school, the task of raising individuals interested in that which is published has proved to be a huge challenge.

Chapter 10 is titled, *Causes and Effects of Rural to Urban Migration: A Comparative Analysis of Zambia and Ireland*. Although strictly cast outside the realm of education, this chapter discusses the classical sociological issue of migration and related issues in comparative fashion using Zambia and Ireland as case studies. These sociological issues and the proponents behind them, make the discussion in this chapter relevant to not only sociologists but educationalists as well.

Chapter 11 is a review of the book titled, *Introduction to Educational Administration and Management* authored by Alfred Kakanda. This is a timely review of an important book which deals with a key issue in education.

I hope that this book will prove helpful to all stakeholders. I greatly feel honoured to have this rare privilege of putting these articles together.

Madalitso Khulupirika Banja

March, 2017

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CHAPTER 1

Curriculum Re-Engineering and Development in Zambia: the Sociology of Education in the Face of Globalisation

Mubita Likando Simamuna and Innocent Mutale Mulenga

Abstract

With so many definitions of a curriculum found in the literature, it can be challenging for a novice scholar of education to settle for all-encompassing definitions of curriculum and curriculum development. This chapter commences by giving concise but clear definitions of a curriculum and curriculum development. The authors then link these to the cultural and sociological concerns and demands of Zambian languages. Thereafter, the chapter discusses global and external curriculum influences and then explains how globalisation has influenced curriculum re-engineering. The importance and necessity of considering local needs in the process of curriculum change and reform is what cobbles the chapter.

Keywords: Curriculum, Curriculum development, Globalisation

Introduction

The concept of curriculum is as old as the education system itself (Carl, 1995). This is logical and understood because a curriculum is a means of achieving educational goals. It is a programme that education systems develop and design in order to move learners towards the attainment of a set of educational goals. Ndlovu (1997), points out, however, that the concept of curriculum is in itself broad and comprehensive hence it sometimes lends itself to varied interpretations. The different interpretations that educators and other scholars find themselves making are partly because of their different perceptions,

contexts and conceptions of the curriculum which they experience. It is not the purpose of this chapter to analyse and discuss all the interpretations that have been advanced over the past years because it would be a massive undertaking and moreover skew the focus of this writing away from its intent. However, it would be scholarly important to briefly have a working definition of a curriculum for this chapter.

It is common to find writers and scholars who define curriculum as content. A curriculum defined as content or subject matter is an interesting one because it brings into question another term, namely the 'syllabus,.' A 'syllabus' is usually a summary statement about the content to be taught in a subject, course, or unit, often linked to an external examination. It is typically a list of content areas. A syllabus is clearly a subsection of a curriculum and as such is subsumed within the broader concept of a curriculum. This emphasis on what content is to be taught is a critical element of a syllabus, but a curriculum includes more than this. Characterising curriculum as a subject matter is the most traditional image of curriculum, which depicts it as the combination of subject matter to form a body of content to be taught. Such content is the product of accumulated wisdom, particularly acquired through the traditional academic disciplines. In fact, most teachers, when asked to describe the curriculum, provide a litany of subjects or subject matter taught to learners. A definition by Tanner and Tanner (1975: 12) sheds more light on the understanding of a curriculum as:

> ...the planned and guided learning experiences, formulated through the systematic construction of knowledge and experiences, under the auspices of the school, for the learner's continuous and wilful growth in personal and social competence. Thus, a curriculum is more than content, which in fact is just one of the elements of a curriculum.

Thus, it would be in order to agree with Print (2007: 16), who defines a curriculum as, 'All the planned learning opportunities offered to learners by the educational institution and the experiences learners encounter when the curriculum is implemented'. From the two definitions of a curriculum, it can be concluded that a curriculum is arrived at through a number of related processes. It is for this reason that Mulenga (2011: 19), defined a curriculum as 'All the selected, organised, integrative, innovative and evaluated educational experiences that are provided to learners consciously or unconsciously under the school authority in order to achieve the designated learning outcomes'. Therefore, based on these definitions, curriculum development is more than just updating subjects, such as replacing 'old' mathematics with 'new' mathematics. It is instead a purposeful and systematic construction of learning experiences and their continual evaluation. It captures all the processes that are necessary to design, implement and evaluate a functional curriculum. Moreover, the development of a national curriculum requires the

consideration of the general educational philosophy, aims of education, and the political ideologies of a particular nation.

In Zambia, the curriculum frameworks and the various national policies of education, such as the *1977 Educational Reforms*, *Focus on Learning of 1992*, and *Educating our Future; National Policy on Education of 1996* are equally indispensable for curriculum definitions, curriculum design, development and implementation. These national documents clearly state the curriculum contents, needs and requirements associated with the expectations of the Zambian society. Bishop (1985), states that a curriculum should be designed in the light of the major trends and developments of society and it should mirror the major social and cultural needs of the society and its learners; in this case reflecting the social and cultural needs of the societies in Zambia. However, it is most unlikely that one can learn the culture of the people whose language he/she can neither speak nor understand. The learning of culture in such incidences will certainly be very difficult and mostly unattainable. Cultural values are usually reflected in the people's language, ethics, social hierarchy, aesthetics, education, law, economics, philosophy and social institutions.

Curriculum Implementation and Society's Language Needs

The current concerns of the Zambian cultures are that most of the younger generation especially those in urban areas do not speak their native languages fluently and some of them do not speak them at all but claim to know English only. If Zambia desires to pass on its traditional culture and native languages to its youth, then it should start with the promotion of its local languages, both in homes and in schools, as traditions are best acquired orally and practically.

How can the curriculum play a role in solving what seems to be a national problem? Does the solution lie in requiring that students select one Zambian language from the seven (Bemba, Lozi, Kaonde, Tonga, Luvale, Lunda and Nyanja that appear in the curriculum), as a compulsory subject from primary onwards, with examinations at grade seven and other levels? These are but a few questions for consideration. Although globalisation influence is intense, its impact would not be so much on the learners if they are exposed to their culture by way of learning local languages in the curriculum.

The Zambian curriculum is quite flexible, as evidenced in its embracing of the teaching of foreign languages both in government and private institutions. For example, since Zambia's political independence in 1964, French has been taught and well attended by Zambian learners of all ages. The reason for this popularity is that many students want to learn French either for social reasons or simply to foster a career. Recently, there have been a number of burgeoning schools for Chinese language to the extent that the University of Zambia has also introduced a bachelor's degree in Chinese language. Additionally, the Chinese language is strongly supported by the Ministry of Education, to the

extent that there is a chance it will become a standard part of the national curriculum. These foreign groups (French and Chinese) are likely to achieve the social and cultural needs of the their people. With this in mind, some questions that beg answers include: What impact has the learning of French in Zambian schools upon the Zambian society? What impact will the learning of Chinese have upon the Zambian society? While learning a foreign language is generally a beneficial endeavour, it is nonetheless worth examining why the teaching of a language such as French is given more attention than the local dialects, simply because it is a foreign language. Apparently, the influence of globalisation may have led the Zambian education system to overlook the importance of its own local languages.

From a critical perspective, it can be said that the Zambian curriculum has, in the past, put forth more effort to embrace the learning and teaching of French in schools (though it has been optional) than the learning and teaching of Zambian languages. It is worth mentioning, however, that at the secondary level, Zambian languages have been taught by specialised teachers, as an optional subject. Zambian languages as envisaged in the new curriculum will be taught as core subjects for all learners pursuing a career pathway at the junior secondary level (MESVTEE, 2013).

For a school to offer French as a subject, it will require that they employ teachers who are specially trained to teach the subject, regardless of whether or not they had studied French in school. The Ministry of Education (1996: 47) indicated that, every pupil shall be required to take a local language from Grade 1-4 and may continue to learn a local language as an option subject thereafter. The same initiative has been reaffirmed 16 years later in the new curriculum that was launched in 2013. Among the notable major changes in the 2013 curriculum is the requirement that, from early childhood to Grade 4, the language of instruction in all learning areas would be one of the local languages (*Times of Zambia*, 14th February 2013).

However, unlike French and now Chinese, there is no requirement that teachers should participate in specialised language training, prior to teaching any of the Zambian languages, as long as they are Zambians and have studied the local languages in college. The approach taken to teach the Zambian languages is built on the assumption that all Zambian teachers have studied all of the seven main local languages. Therefore, teachers are expected to teach any Zambian language in the primary school context, regardless of the local language in which one is specialised or conversant. Certainly, there are a number of potential issues associated with these minimal requirements. The fact of the matter is that when primary school teachers are deployed and posted to various schools, consideration of which local language one has studied or with which one is conversant with is not taken into consideration. Thus, a teacher who studied Silozi during training may be posted to Kasama where Bemba is the local language. At the primary level of Zambian schools, there is

no specialisation – it is one teacher per class for all subjects. While this is the existing norm, it would be beneficial to try new approaches. Is it not prudent for schools to utilise specialised or conversant teachers in the local language of the area to teach Zambian languages? With the localised curriculum now implemented, can the local residents assist when need arises? If so, are the local residents qualified to teach? The Zambian education system should endeavour to teach Zambian languages with the importance it deserves, just as it is currently doing with the teaching of French and Chinese.

The International/Global Influence

Having discussed the perspective of a Zambian curriculum in respect with Zambian languages, it is obvious that international influence under the concept of globalisation has had some influence regarding foreign language teaching and learning. Much as a curriculum is developed by respective nations in line with their ideologies, international ideologies are likely to be inevitable when a nation like Zambia is part of the global community. Leonard (2003: 383-418), states that, 'Globalisation refers to a complexity of technological and economic factors including the global spread of communication technology networks, and the global interaction of products and labour markets.'

In view of this, Zambia has been caught in several phases of curriculum re-engineering in the effort to meet the global interaction of products and labour markets. This was intended to include some elements or programs, exclusions or entire restructuring of the curriculum. Since 1977, after the first major national curriculum reforms, the Zambian curriculum has not been stable; with some changes being minor while others were major. For example, AIEMS, SHAPE, CHILD-TO-CHILD, PAGE, ROC, NBTL, SITE, PRP, etc. Some of these programs or changes had come and gone under the influence of some donors such as USAID, WORLD BANK, UNICEF and Save the Children Norway.

As noted by Leonard (2003), globalisation includes the global spread of communication technology networks, which Zambia also adopted under *iSchool.zm* e-Learning package. The website reports that it is already established and working in urban and rural schools. This means, however, that only schools with a power supply and internet access are connected to this e-Learning curriculum package. In the meantime, schools without power or internet access are left out of this development. The fact that it is running only in urban and rural schools that can access it, is not ideal for the nation. It will be incumbent upon the Ministry of Education, Science and Vocational Training and Early Education to spearhead the spreading of e-Learning to all rural schools if its impact is to benefit all learners.

Curriculum development and re-engineering traces its way from the independence era. Since independence, Zambia has undertaken six curriculum innovations in primary teacher education namely; Zambia Primary Course

(ZPC), Zambia Basic Education Course (ZBEC), Field-Based Teacher Training Approach (FIBATTA), Zambia Teacher Education Reform Programme (ZATERP), ZATEC (one-year residential) course and ZATEC (two-year residential) course. It was noted that most of these curriculum innovations had been on experimental basis without a solid philosophical foundation anchored in research (Kalimaposo, 2010).

One other development by the Ministry of Education was the introduction of the Basic Education Sub-Sector Investment Programme (BESSIP) from 1999 to 2002, which resulted in the Basic School Curriculum reforms. These reforms were necessitated by the need to solve the long-standing problems in the existing curriculum such as; overloading, compartmentalisation, examination-oriented and inflexibility. The reforms were also an attempt by the government to capture the latest technology, economic, political and social developments of the fast-changing world (MoE, 2003). In response to these reforms, new syllabi were developed with five learning areas which involved integrating the eleven traditional subjects (Mathematics, English, Science, Physical Education, Religious Education, Social Studies, Music, Art, Home Economics, Handwriting and Zambian Languages) into the five following categories: Literacy and Language, Mathematics, Integrated Science, Creative and Technological Studies, Social and Development Studies (MESVTEE, 2013).

In Zambia, curriculum re-engineering has been an ongoing activity. The education system has been incorporating changes, inclusions, exclusions, replacements, and introductions of many curriculum elements with the support of the donors like UNICEF and DANIDA. Kalimaposo (2010: 195), noted that 'Some of the changes introduced in the curriculum by foreign experts did not suit the Zambian situation.' He further stated that the foreign initiated programmes were not sustainable and not compatible with the reality in the classroom, and thus reliance on foreign technical assistance was detrimental in the local contexts. Vevrus (2009), describes these changes and introductions in the classrooms as cultural politics of pedagogy.

Globalisation plays a significant role in curriculum re-engineering and development. *Education for All*, for example, has brought with it implications for the curriculum. *The Education for All* movement is a global commitment to provide quality basic education for all children and youth. This movement was launched at the *World Conference* on *Education for All in 1990* by UNESCO, UNDP, UNFPA, UNICEF and World Bank in Jomtien, Thailand. Ten years later, with many countries far from having reached this goal, the international community met again in Dakar, Senegal and affirmed their commitment to achieving Education for All by the year 2015 (*Zambia National Commission for UNESCO, 2008*). They identified six key education goals, one of which was improving the quality of education. However, improving the quality of education would not be achieved if the curriculum remained out of context. As stated earlier, globalisation brings in new ideas that influence third world

countries like Zambia to adjust their curricular. Universal Declaration, states that everyone has the right to education, education shall be free at least in the elementary and fundamental stages, elementary education shall be made generally available, and higher education shall equally be accessed to all on the basis of merit (*Universal Declaration of Human Rights Article 26*). After this declaration, many newly independent countries embarked on programmes of Universal Primary Education. They did so in response to the demands of the declaration. Thus, most nations expanded their existing educational systems, aimed at enrolling a large number and proportion of the youth population at each level. The dramatic increase in enrolment that followed has brought with it significant problems. Bishop (1985: 40) points out:

> The figures hide the vast social waste and human tragedy in the high rate of drop-outs and failures and the large number of costly 'repeaters', and most important, they say nothing about the nature, quality and usefulness of the education received'.

Here globalisation had successfully re-engineered the curriculum of the third world states. Unfortunately, the individual states are left with the task of managing the negative effects of these programmes. Zambia too is a none exceptional case in that its education system has experienced over-enrolment, with up to 80 pupils per classroom. The recommended enrolment per class is 40-45 pupils. The over-enrolment was as a result of the effort made to meet the goals of *Education For All* by the year 2015. As Kelly (1999: 193) has noted, 'The focus of Basic Education must, therefore, be on actual learning acquisition and outcome, rather than exclusively upon enrolment, continued participating in organised programmes and completion of requirements.' An overcrowded class with 80 pupils is likely to result in inadequate learning due to, shortage of classroom space and materials, and the added teaching pressure placed on the teacher.

Key Local Curriculum Influences and Drivers

Much as international forces are inevitable, domestic influences require attention; the curriculum should be developed or changed in order to achieve the objectives of the citizens of the nation. Moreover, curriculum change is a process that should be driven by local needs. The need for change may come from teachers, students, parents, administrators, employers, educational system or a combination of these sources (Kalimaposo, 2010). It is these same sources that are in the ideal position to understand the country's philosophy of education. However, change will not occur without the need being felt.

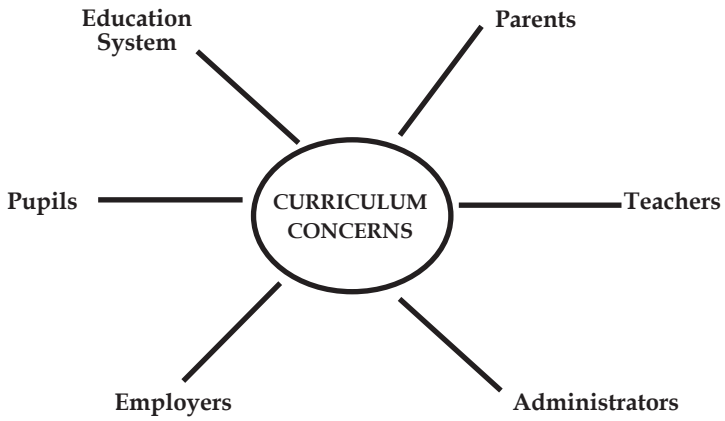

Fig. 1: *Complex network sources of curriculum determinants*

All the above-stated sources of curriculum concerns, as indicated in Fig 1, form a complex network that can analyse and synthesise its own curriculum and effectively meet the needs of its own nation. It is only when fiscal matters arise that a donor's influence is felt. At this level, the nation loses sight of what it really needs, and entertains the voice of a donor. The nation now creates a loophole for the donor to distort its desired curriculum. What is certain is that donors do not just fund, they bring with them their own ideas to replace the curriculum, or change it to some extent. When all is settled with the donor, the nations' desired curriculum will have been re-designed. The result may not be aligned with the needs of the nation because it is driven by the interests of the donors. Samoff (2007: 502), states that 'to secure funding and to meet aid requirements, African governments and education ministers regularly incorporate into their plans and programmes what they understand the funding agencies to expect.' He further noted that, the analytical challenge is to explore how and why technical assistance agency staff pursue strategies that, though intended to be helpful, limit and undermine educational innovations and reforms in Africa. Receiving countries are instead told that it is safer, prudent and cost-effective to use well-established ways of doing things, including curriculum and pedagogical approaches.

International ideas impact on the nation and its identity undermines the ability to determine its own future. This is supported by Burbules and Torres (2000: 1) when they describe globalisation as:

> …primarily meaning the emergence of supranational institutions whose decisions shape and constrain the policy options for any particular nation-state; for others ; 'Globalisation' is primarily a perceived set of changes, a constriction used by state policy makers to inspire support for and suppress opposition to changes because 'greater forces' (global

> completion, responses to IMF or World Bank demands, obligations to regional alliances, and so on) leave the nation-state with 'no choice' but to play a set of global rules not of its own making.

The *Zambia National Commission for UNESCO, Annual Report (2009: 14)*, states that:

> The United Nations Decade of Education for sustainable Development (2005-2014), for which UNESCO is the lead agency, seeks to integrate the principles, values, and practices of sustainable development into all aspects of education and learning, in order to address the social, economic, cultural and environmental problems we face in the 21st century.

This is one aspect of global involvement in curriculum re-engineering and the global influences on the curriculum have their own merits. For example, Chinnammai (2005), noted that the introduction of technology into the classroom is changing the nature of delivering education to students; and is gradually giving way to a new form of electronic literacy. More programmes and education materials are being made available in electronic form. Teaching and learning materials including students' assignments and projects are generated in electronic age. Zambia can certainly not be left out of this electronic form. It is obvious that globalisation has successfully re-engineered the curriculum to fully embrace ICT in Zambia. It is for this reason that Chinnammai (2005), further stated that, in the 21st century, educational systems face the dual challenge of equipping students with the new knowledge, skills and values needed to be competitive in a global market while at the same time producing graduates who are responsible adults, and good citizens both for their country and the world.

Conclusion

In summary, curriculum decisions are thus not about content only or the most effective ways of organising the teaching and learning of the subject matter; curriculum decisions involve a complex network from the grassroots, educators, the community, society, the state and international states. However, curriculum reforms are inevitable in this fast-paced and emerging technological world. Much as we may know that a curriculum is never static, it must not be forgotten that Zambians have various cultural backgrounds. These cultural backgrounds go along with their norms and traditions. However, not all traditions may be desirable, and not all elements of curriculum re-engineering through globalisation are desirable either. The best is to harmonise the two.

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CHAPTER 2

The Sociology of Education: Major Themes and their Relevance-Past, Present and Future

Mubanga Mofu Mwansa and Sylvia Mwanza Kabaghe

Abstract

Sociology of education as a study of education from a sociological perspective is a very important discipline in the teaching profession for both teachers and student teachers. It equips them with the knowledge of the overall education process and the teacher's role in education. It deals with social issues such as social inequality, patterns of behavioural forces in organisations and how social systems work. Sociology of education deals not only with processes within the education system but also the inter-dependence and inter-relatedness of education and other social institutions such as family, religion, economics, health and politics. It raises the awareness of social processes within the school and society that affect the outcomes of learning. One such process is that of socialisation which gives teachers an insight into the social, political, economic and cultural factors that influence the academic performance of learners. Through the study of sociology of education, teachers are exposed to micro and macro theories that explain factors that affect the academic performance of pupils and how the education system operates, and is affected by other social institutions. Sociology of education is not only relevant to teachers but also to other professionals such as medical doctors, politicians, businessmen and women, social workers and so on.

Introduction

This chapter discusses the relevance of sociology of education to a teacher. It begins with defining the two terms: sociology of education and education; and gives a brief background of Sociology of Education. In discussing its relevance to the teaching profession, the relevance of the discipline in the classroom and society has been discussed. The chapter further, highlights the

relevance of sociology of education to other professions. The relevance of this field has been discussed at both micro and macro levels although no explicit distinction has been made in the discussion.

Definition of Sociology of Education

Sociology of education is the study of education from a sociological perspective. To put it more broadly, it is the study of educational structures, processes and practices. Its theories, methods and appropriate sociological questions are used to better understand the relationship between educational institutions and society both at micro and macro levels (Saha, 2011; Giddens 2006; Trowler, 2005). Kibera and Kimokoti (2007: 19) further state that Sociology of Education:

> ...investigates the functions of education, that is, what education does, its methods, institutions, administration and curricula in relation to other parts of the society such as the economy, government, religion and the family... It also seeks to establish the influence of socio-cultural forces such as religion, beliefs, traditions and cultural heritage in general on the educational outcomes and development of personality.

Sociology of education overlaps with other branches or sub-fields of sociology such as sociology of religion, social stratification, race and ethnicity. As a result of its wide scope, sociology of education contributes something to almost all sub-fields in sociology. Its reputation has sometimes struggled for recognition and prestige especially when compared to other sociological disciplines. This, it has been suggested, could be due to dual representation in both sociology and education (Saha, 2011). In the USA, for instance, apart from being taught as a subfield in Departments of Sociology, it was also taught in Departments of Education for teacher training (Saha, 2011). In Zambia, sociology of education is offered in colleges of education and other higher institutions of learning that offer education programmes.

Brief Background of Sociology of Education

Sociology of education is mainly associated with a French scholar, Emile Durkheim (1858-1917). He was a French professor of pedagogy and used sociology to study education. He was the first professor of sociology in Europe and was among the first scholars to analyse education from a sociological perspective and introduced sociology of education in teacher training. It was Durkheim's creation of the first European department of sociology that led to the establishment of sociology within the world of academia as an accepted social science.

Durkheim defined education as the influence the older generation exerts on the younger generation or those not yet ready for social life. Therefore, education is expected to arouse and develop in the children, certain physical, intellectual and moral states, which are demanded of them by the society (Haralambos and Holborn, 2004). Durkheim believed that in all aspects, education is closely related to all social structures or institutions in society as well as to current beliefs and values.

In the broadest sense, education includes the experiences that train, discipline, and shape the mental and physical potentials of the maturing person. Sociologists of education make a distinction between informal and formal education. Informal education occurs in a spontaneous, unplanned way while formal education is a systematic, purposeful and planned effort intended to impart specific skills and modes of thought. It is imperative to still note that, what constitutes an ideal education, in terms of learning objectives, material, and instructional techniques varies according to time and place (Farrante, 2011).

According to Durkheim, moral values were the foundation of social order and these could only be perpetuated by society through the institution of education. It is through school discipline, enforced by school regulations and authority, that children learn to obey authority in society as they generalise what they learn in school to the wider society. It is this discipline that greatly contributes to stability in society (Openstax College, 2012). However, Durkheim does take note of the fact that each society has its own distinct education system best suited for its society with the main purpose of creating homogeneity (Stevens, 2005), and ensuring the survival of society (Kibera and Kimokoti, 2007). This entails that, if a society fails to educate or train its members in the skills and knowledge necessary for perpetuating that society, order and social control would be compromised.

Among other scholars that contributed to the development of sociology of education is Max Weber whose ideas have had a major effect on studies of the social organisation of the school, and within them, the roles of school managers and teachers and the hierarchical relationships between them (Saha, 2011). Bureaucracy as this type of social organisation came to be known, was designed to coordinate the activities of many people in pursuit of organisational goals. Weber analysed the classic characteristics of a bureaucratic organisation. These characteristics represent what he called the ideal type bureaucracy, a model rarely seen in reality but which defines the principal characteristics of a social organisation (Andersen and Taylor, 2011).

Weber's contribution to the development of sociology of education is equally important as it helps stakeholders, especially teachers, within the education system to understand operations of schools. The officers referred to are teachers who offer a service to their clients, the pupils. The school as

a bureaucratic organisation is characterised by a high degree of division of labour and specialisation. Teachers are employed to perform specific duties depending on their area of specialisation. For instance, if a teacher studied history and religious studies at college or university, he or she is employed to teach those subjects, and not biology or mathematics. This ensures efficiency and effectiveness, and makes it easier for the school to attain its goals.

Schools are also characterised by a hierarchy of authority. Positions are arranged in a pyramid structure such that each position is under the supervision of a higher position (Giddens, 2006). Almost everything that takes place in a school is predetermined or governed by a set of rules and procedures. These written rules and procedures are designed, ideally, to cover almost every possible situation and problem that might arise, including hiring and firing of workers, salary scales, and rules for leave days and sick days. These rules make it easier to operate the school as each teacher knows the *dos and don'ts* and what is expected of them. Additionally, these rules also help teachers to make decisions objectively. As a result, favouritism is minimised. In Weber's ideal bureaucracy, workers ought to be impersonal in their relations with both fellow workers and clients (Giddens, 2006). Other scholars that have contributed to sociology of education include Robert Merton, Talcolt Parsons and Herbert Spencer among many others.

Relevance of Sociology of Education to the Teaching Profession

According to Ballantine and Hammack (2009), sociology of education introduces student teachers to some of the major themes in education. It also gives them theoretical frameworks and analytical skills used by sociologists of education to investigate social phenomenon and inform policy. It looks at schools as social institutions, their functions in modern society and their impact on social processes and life chances of individuals.

Sociology of education shows teachers that individual failures and or successes are socially as well as personally constructed (Marsh, 2006). In order to assess or evaluate pupil academic achievement, teachers use tests and grade pupils. By so doing, teachers perform the selective and allocative function of education. Schools issue certificates to pupils, which determine whether pupils would be accepted or rejected in colleges and universities. This tends to track pupils into different careers; the better performers into the most desirable and important jobs and the least performing, into less desirable and lowly perceived jobs. Tracking starts early in schools by assigning pupils to different ability groups or classes.

As a result of tracking, pupils assigned to low ability groups may be exposed to inferior instruction and watered down curricula. These pupils rarely 'develop positive self-images because they are treated as educational discards, damaged merchandise, or even as unteachable' (Farrante, 2011).

Tracking, in most cases, fosters low self-esteem, misbehaviour, higher dropout rates and lower academic aspirations among pupils assigned to low ability groups. Grading and tracking, risks lowering pupils' self-esteem and academic performance, as pupils may receive poor marks due to a number of factors outside their control. Such factors include socio-economic status, child abuse, teachers' personality, teacher-pupil relations and bullying. Although this has been the expected function of education, especially when viewed from a functionalist perspective, this function seems to be changing. It is not always the case that low-performing students are tracked into lowly perceived jobs. Other factors at play include one's intrinsic motivation to prosper, aspirations and socio-economic background among many others. Assigning pupils to high ability groups, on the other hand, has positive effects on their academic achievement regardless of family background and ability differences. In addition, assigning pupils to ability groups sometimes affects their performance, the single most important factor in a teacher's effectiveness (Wikibooks, 2006), and pupil performance is the interaction style and personality of the teacher. The quality of the teacher-pupil relationship provides the impetus for inspiration. Teachers invigorate students to higher expectations of themselves and society at large.

Sociology of education helps teachers to understand how factors outside the classroom such as social economic status or social class, ethnic group and gender impact on educational achievement. This also helps teachers to understand which factors have more influence than others. Marsh (2006), contends that social class explains more on this differential academic achievement than, for example, gender and ethnicity. For instance, pupils from a high social class have all the educational resources and supportive home environment, enough food, decent place to sleep; and will definitely attend better schools as compared to pupils from a low social class. When equipped with this information, teachers are better placed to find ways of enhancing academic achievement among pupils. It is also imperative for teachers to understand that these inequalities can be influenced by the dominant political ideology (Marsh, 2006). Neighbourhood and peer environment are closely intertwined with family background. After all, a family's economic standing determines the housing it can afford and the neighbourhood in which it lives. That does not mean that students are trapped by their family background.

Research studies confirm the importance of family background in educational achievement. For instance, the International Association for the Evaluation of Educational Achievement (2003) tested students in 22 countries on six subjects. The study found that home environment is the key factor in determining the level of academic achievement, interest in learning, and years of schooling. However, it is important to note that, family background which

was defined in terms of parents' race, income, education, and occupation explains only about 30 per cent of the variation in student academic performance. Factors other than home background, must also be involved. In fact, Coleman *et al.*, (1961), noted that family background alone did not explain all of the variation in test scores and that it was not easy to separate the effects of family background, neighbourhood, and peer influences.

Aside from tracking, sociology of education provides a wide knowledge base for teachers to bear in mind that there are a lot of factors that affect the outcomes of learning. Teachers are also a major factor in determining the outcomes of learning because the way pupils are treated or perceived by their teachers will, to a larger extent, determine the behaviour and academic achievement of pupils. This is best explained through the theories that teachers are exposed to, through sociology of education; theories such as the labelling theory and the new sociology of education theory.

The Labelling Theory brings to the fore the concept of the self-fulfilling prophecy in education. The self-fulfilling prophecy occurs when teachers and administrators assume that some students are fast, average, or slow learners and consequently expose them to fast, average, and slow learning environments. Over time, as Ferrante (2011) states, pupils come to believe that they are slow, average or fast. In the same vein, the proponents of the 'New' sociology of education theory argue that classroom interactions between teachers and pupils, content of the curriculum and how it is delivered as well as the concepts that teachers use to describe their learners, affect pupils' academic performance. Furthermore, Coleman *et al*. (1961) contend that the manner in which pupils are taught might affect their interest in academic work.

At a macro level, sociology of education through theories like the conflict and structural functionalist theories exposes teachers to societal factors that affect academic achievement, such as socio-economic status and political ideologies. Conflict theorists such as Karl Marx, Randall Collins, Ivan Illich and Max Weber argue that the role of education is the reproduction of an efficient, submissive and obedient workforce. This workforce serves the interests of the ruling class or dominant groups in society. The economy of a country thus shapes the institution of education in order to serve the interests of the dominant groups in society. This reproduction of a submissive workforce that serves the interests of the ruling class is achieved through ideological state apparatuses such as media, religion and education which are controlled by the ruling class through directives of governments, bureaucratic organisations and statutory regulated professional bodies (Ballantine, 2011; Lawson and Garrod, 2009; Illich, 1986). Ruling class ideology socialises the workforce into accepting and submitting to exploitation by the ruling class

(Ballantine and Spade, 2008). Schools are regarded as repressive institutions (Laverne, 1995) which stifle creativity and indoctrinate pupils into accepting the interests of the ruling class.

Through the structural functionalist theory propagated by scholars such as Emile Durkheim, Robert Merton, Herbert Spencer and Talcott Parsons, teachers are provided with yet another theoretical perspective to understanding the role and processes of education in society. This theory mainly explains how social order and stability is maintained in society. A certain degree of order and stability are essential for the survival of social institutions (Neubeck and Glasberg, 2005). For this to be achieved, there is need for value consensus which provides the foundation for cooperation as common values produce common goals and members of the society tend to pursue common goals that they share. According to functionalist theorists, the institution of education preserves and transmits society's norms and values in order to maintain order and stability (Openstax College, 2012). It is also important for teachers to understand how education prepares societies for social change. Teachers need to impart the relevant skills, knowledge, attitudes, norms and values in pupils in order for them to facilitate the innovative function that responds to change in society (Ballantine, 2011).

Through theories such as the conflict and the structural functionalist, sociology of education explains how processes in education are affected, and how they affect processes in other social institutions such as family, media, economics, religion, health and law. Teachers are a source of expectations that encourage children to think and behave in particular ways. The expectations encountered in schools vary for different groups of pupils. Studying socialisation processes in the schools and other agents of socialisation at both the micro (family) and macro (society) levels gives teachers an insight into the influence of gender, class, and race in shaping the socialisation process.

Sociology of education also gives teachers an insight into the cliques or subcultures; and peer groups found in schools among pupils. These cliques are not to be ignored as they too influence pupil behaviour and academic achievement. Peer groups exert more pressure on pupils, especially in the adolescent years, than do teachers and parents. Coleman *et al.* (1961), surveyed students from ten high schools in the Midwest of the USA to learn about the adolescent status system. Coleman found that participation in some activities results in popularity, respect, acceptance, and praise, and participation in other activities results in isolation, ridicule, exclusion, disdain, and disrespect. Students show their discontent in conformity to teacher commands by choosing to become involved in and to acquire things they can call their own

and which they consider important to the school and the community. This could be sporting activities or winning a beauty contest, or being the leader in the school or church choir.

Teachers also need to realise that some subcultures rebel against school rules. It is these that disturb smooth operations in the school as they tend to be unruly and are capable of inciting riots in the school and influencing others into acts of indiscipline. Sociologists of education use the term counter-cultures in reference to subcultures that challenge, contradict, or out rightly reject those of the mainstream culture of which they are a part. Some counter-cultures 'attack, strongly or weakly, violently or symbolically,' that which they think is frustrating social order or when they feel their needs are not being met in school or in the community. These subcultures have an effect too on academic achievement. These subcultures are an important source of approval, disapproval and support for they exert more pressure on pupils than do teachers, parents and other authority figures. Research (Andersen and Taylor, 2011; Ferrante, 2011; Datta, 1984), has found that school children form subcultures that resist the dominant culture in schools thereby affecting both the behaviour and performance of pupils.

In addition, sociology of education helps teachers understand the relationship between the school and community and/or society. Schools perform a number of important functions that serve the needs of society and contribute to its stability. For instance, the school exposes children to a hierarchical, bureaucratic environment, where children are trained to respect authority, to be punctual, and follow rules. This mainly takes place through the hidden curriculum. This exposure, consequently, prepares them for their future roles as workers in organisations that value these traits. Although schools emphasise conformity to societal needs, not all children internalise these lessons to the same degree (Andersen and Taylor, 2011). Teachers also have to bear in mind that they ought to be exemplary in behaviour as they are role models to their pupils. This is cardinal because in school, children acquire identities and learn patterns of behaviour that are congruent with the needs of other communities.

Schools perform a number of functions and teachers are at the core for these to be achieved. This raises the need for teachers to understand the critical role they play in the education system. This goes beyond transmitting skills such as reading, writing and numeracy (Andersen and Taylor, 2011). Through the study of sociology of education, teachers are exposed to the roles they have to play which go beyond the boundaries of their classrooms. According to Ferrante (2011) society, at large, and stakeholders in education such as employers, parents, and government officials remind teachers constantly of the ideas, the sentiments that must be impressed on students (Durkheim,

1956). Educators must pass on a sufficient community of ideas and sentiments without which there is no society. These ideas and sentiments may relate to instilling a love of country, training a skilled labour force, or encouraging civic engagement and patriotism. Without some agreement, 'the whole nation would be divided and would break down into an incoherent multitude of little fragments in conflict with one another.'

Societies use education-based programmes such as sociology of education to address a variety of social problems affecting the institution of education and the wider community such as; single households, blended families, illiteracy, drug and alcohol abuse, poverty, inequality, malnutrition and teenage pregnancy. Although all countries support education-based programmes that address social problems, some countries place particular emphasis on education as a primary solution to many of these social problems. For example, in America the belief that programmes such as sociology of education can be used to solve social problems and address community needs manifests itself in service-learning programmes and partnerships with community-based organisations to address social problems both at a local and global level (Ferrante, 2011). If teachers do not understand this, it would be difficult for them to adequately fulfil their role as teachers.

Thus, sociology of education makes teachers aware that they teach two curricula simultaneously; the formal curriculum and the hidden one. The formal curriculum comprises all the academic subjects such as history, civic education, mathematics, science, English and geography. However, as pupils learn these subjects, there is also another curriculum being taught albeit unconsciously. This is the hidden curriculum.

The hidden curriculum, according to Ferrante (2011: 427);

> ...encompasses the teaching method, type of assignments, kinds of tests, tone of the teacher's voice, attitudes of classmates, the number of students absent, the frequency of teacher absences, and the subjective criteria teachers use to assign grades. These so-called extraneous factors convey messages to students not only about the value of the subject but also about the values of society, the place of learning in their lives, and their role in society.

From the above it is clear that the teachers' roles are diverse both in and outside the classroom.

Relevance of Sociology of Education to other Occupations

Sociology of education provides insight and skills that deal with complex organisational and interpersonal issues that not only confront teachers but also administrators in various organisations. For instance, in the medical field health personnel come across patients with a range of concerns and from a

diversity of social backgrounds. Sociology of education helps health personnel understand the needs of their patients, issues to do with the relationship of health personnel with patients, informal care-givers and the role of other health professionals in the workplace (Green and Earle, 2009).

Sociology of education helps in the application of the sociological perspective to a wide variety of occupations in such sectors as business; health professions; criminal justice systems and social services and government and the development of personnel such as professors, researchers and applied sociologists. An undergraduate degree in sociology of education provides a liberal arts preparation for entry level positions throughout the business, social service and government worlds (Giddens, 2006). It further provides skills such as critical thinking, integration and application of knowledge and understanding of society and culture (Howard and Zoeller, 2007).

The subject matter of sociology of education is intrinsically fascinating, as it offers valuable preparation for careers in journalism, politics, public relations, business, public administration; fields that involve working with diverse groups. Many students choose this field because they see it as a broad liberal arts base for professions such as law, education, medicine, social work and counselling (Giddens, 2009).

Although teaching and conducting research remains the dominant activity among sociologists of education, other forms of employment are growing both in number and significance as societies use sociology of education to address a variety of social problems and issues. These social problems include but are not limited to; 'importance of family background on educational achievement', 'racial inequality', 'teenage pregnancy', 'illiteracy', 'religious, rivalry and establishment of religious and elite universities', 'funding higher education', 'social change' and 'population dynamics' among numerous others (Ferrante, 2011).

In some sectors, sociologists of education work closely with economists, political scientists, anthropologists and social workers. It lays the foundation of understanding human relationships; not just in schools but in every kind of social group; regardless of religious, ethnic or political affiliation, disability and socio-economic status. It also helps organisations and occupations on which management styles increase productivity and worker satisfaction (Giddens, 2006).

Sociology of education is an exciting discipline with expanding opportunities for a wide range of career paths. Very few fields have such broad scope for research, theory and for application of knowledge. Sociology of education addresses challenging issues of our time. It is a rapidly expanding field whose potential is increasingly tapped by those who craft policies and create programmes. Sociologists of education understand social inequality, patterns of behaviour forces for social change and resistance and how social systems work (Ferrante, 2011).

Conclusion

Sociology of education exposes teachers to theories that explain factors within and outside the classroom such as those that cause differential academic performance among pupils. For example, the labelling theory shows teachers what role they play in affecting pupils' achievement and behaviour. The 'new' sociology of education theory shows how the curriculum content is organised and taught and how it can affect academic achievement. It also shows how to determine what knowledge should be taught, which knowledge is most relevant, and how well the pupil will retain knowledge.

Through the study of sociology of education, teachers acquire a very important intellectual asset for their future teaching career. It equips students with a good grasp of the overall education process and the teacher's role in education, and raises their awareness of the imperatives of social dynamics. We ought to bear in mind that a truly professional understanding of the education process also requires the acquisition of skills and knowledge from related disciplines such as educational psychology, teaching methodology and research, among others (Mihamisty, 2011). Education courses such as sociology of education are expected to equip teachers with theoretical framework, guiding education and necessary instructive skills (Kibera and Kimokoti, 2007).

Schools exist to teach pupils and other stakeholders in education the skills they need to adapt to the society and world in which they live. To ensure that this end is achieved, stakeholders in education such as employers, parents, and government officials remind teachers what must be impressed on students. Teachers' jobs are complex; teachers are expected to undo learning disadvantages generated by inequalities in the larger society and to handle an array of discipline problems. Sociology of education helps teachers to understand the cause, process and consequences of these inequalities.

Education is a platform for instilling a sense of national unity for a culturally and linguistically diverse population. Even though school children may be too young to appreciate the meaning of the words in the national anthem, but by merely singing it, it reminds them that they are Zambians, and this fosters allegiance. It is only when teachers understand the critical role that schools play in society that they will appreciate the position they have as teachers in moulding pupils into socially upright citizens.

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CHAPTER 3

Group Process and the Sociology of Counselling Clients

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Abstract

Counselling is sometimes conducted in a group setting. Understanding the nature of group dynamics and approaches to counselling within different group contexts is important to enhance the counsellor's capacity to work with diverse population of clients. This chapter, therefore discusses sociological issues in the delivery of counselling services to clients. Specifically, it examines group counselling, group dynamics and process in guidance and counselling. It also examines the role of groups in the classroom teaching-learning process. It highlights the process of developing a counselling group with a view to facilitating its use in the effective delivery of counselling services. This is particularly necessary in developing countries where students have diverse counselling needs but with the attendant unwillingness of government to increase the number of qualified counsellors to attend to their identified needs.

Introduction

The need for the world economy to change from the machine technology, capital and labour to the intellectual technology, information and knowledge has been stressed (Bills, 2004). The author argues that such an evolution would demand a labour force with skills in social interaction and in exchanging and manipulating information. How these are variously accepted, contested and negotiated is known to sociologists.

The Meaning and Relevance of Sociology of Counselling Clients

Sociology is one of a number of social sciences which attempts to explain and understand the behaviour of human beings in society (Haralambos & Holborn, 2008). It commonly refers to the study of human social behaviour, especially the study of the origins, organisation, institutions, and development of human society. One of such social institutions that sociologists study is education, particularly in terms of acquisition of formal knowledge, for example, reading, writing, and manipulative skills, as well as acquisition of other skills in form of morals, values, and ethics.

It should be noted that education prepares young people for entry into the society while sociologists seek to know how this form of socialisation affects, and is affected by other social structures, experiences, and outcomes. The study of educational structures, processes and practices from sociological perspectives is, therefore, referred to as Sociology of Education (Saha, 2011).

Saha (2011) contends that Sociology of Education as a subject ensures that theories, methods and appropriate sociological questions are used to better understand educational institutions and society both at the micro and macro levels. Through an examination of the relationship between society and schools, sociologists have uncovered how educational processes affect the way people think, live, and work; their place in society; and their chances for success or failure (Sadovnic, n.d.). It is argued that in countries which have placed enormous faith in the power of schools to ameliorate all types of social problems, such as the United States, and have viewed schools as the central institutions for social mobility, the sociology of education provides evidence about the extent to which schools can solve social problems.

According to Nkhonyo (n.d.), Sociology of Education introduces a teacher to a collection of techniques that are required in classroom teaching, such as understanding and applying interaction in the classroom, the disposition of norms to the students by the teachers, understanding teacher-student relationships and communication, provision of career guidance and finally, understanding social roles of teachers and students.

Hornby (2003), noted that the current emphasis on reforming the school curricula and promoting academic success, which is evident in many countries around the world has diverted attention away from the broader function of the school which is to produce productive and fulfilled citizens. He argues that as schools get concerned with 'delivering' an academic curriculum, other aspects of the school role, such as providing personal and social education, tend to be over looked, leading to insufficient attention being paid to particular needs of learners and also to a lack of appreciation for the key role which teachers can play in meeting some of these needs. Guidance and counselling is the service designed to help the individual to understand himself/herself, and to make correct choices from innumerable alternatives in the course of meeting his/her needs.

Gibson and Mitchell (1999), reported that psychologists have noted the importance of human relationships in meeting basic needs and influencing personal development; and adjustment of persons. They argue that for most people, the vast majority of these relationships are established and maintained in a group setting, and for many, daily routine adjustment problems and developmental needs also have their origins in groups. They, therefore, conclude that the most frequent and common human relationship experiences occur in groups. Thus, groups hold the potential to provide positive development and adjustment experiences for many people.

Group guidance and counselling make skilled and principled use of relationships to facilitate self-knowledge, emotional acceptance and growth as well as the optimal development of personal resources (British Association of Counselling, 1991). Although, guidance and counselling focus on helping individuals to understand themselves in order to become more functional members of the society, counselling clients in groups is to approach issues of personal growth through the use of interpersonal interaction (Iowa State University Students Counselling Services, n.d.). Such interpersonal interactions among counselling clients demands researchers' attention, and it is what is described as sociology of counselling clients.

Providing counselling in groups is very relevant to achieve therapeutic goals in counselling as well as personal growth. It allows clients to interact with others to identify and understand their maladaptive patterns and how to change them. Group interactions provide an opportunity to build relationships and receive interpersonal feedback about how the clients understand one another. Clients can gain specific skills and strategies to meet personal goals, explore areas that present personal challenges, and gain support and encouragement from others.

Group Dynamics and Why People Form Groups

A group is commonly defined as a number of people or things that are located close together or are considered or classed together. In human context, a group is commonly described as a collection of individuals who have regular contact and frequent interaction, mutual influence, common feeling of companionship; and who work together to achieve a common set of goals. Although psychologists argue that people only need to be in each other's presence and do not have to be interacting with each other to be considered a group (Aronson, Wilson & Akert, 1999), counselling groups are characterised by interaction to be functional (Gibson & Mitchel, 1999).

Groups are a fundamental part of social life. As we will see, they can be very small - just two people - or very large. They can be highly rewarding

to their members and to society as a whole, but there are also significant problems and dangers with them. All these make them an essential focus for research, exploration and action.

Groups can be of different types and there are various ways of classifying groups under given types. Such classification is commonly done in terms of their linkage, structure and purpose for both practitioners and researchers. Adopting linkage, groups can be classified as primary and secondary groups. According to Geber and John (2010), a primary group is a small social group whose members share personal and lasting relationships. People who are joined in primary relationships spend a great deal of time together, engage in a wide range of activities, and feel that they know one another well. In every society, the family is the most important primary group. Groups based on lasting friendships can also be described as primary groups.

Secondary groups, in contrast, are large groups involving formal and institutional relationships. Secondary relationships involve weak emotional ties and little personal knowledge of one another. Most secondary groups are short-term, beginning and ending without particular significance (Geber and John, 2010). They may last for years or may disband after a short time. The formation of primary groups happens within secondary groups. It should be noted that, primary groups can be present in secondary settings. For example, attending a university exemplifies membership of a secondary group, while the friendships that are made there would be considered as a primary group that you belong to. Likewise, some businesses care deeply about the well-being of one another, while some immediate families have hostile relations within it.

According to purpose, groups can be classified into planned and emergent groups. Planned groups are specifically formed for some purpose–either by their members, or by some external individual, group or organisation. Emergent groups on the other hand come into being relatively spontaneous where people find themselves together in the same place, or where the same collection of people gradually comes to know each other through conversation and interaction over a period of time (Smith, 2008).

Forsyth (2006), contends that people form planned groups, but they often find emergent groups. They are sometimes referred to as 'formed' groups and 'natural groups' respectively. Further, Arrow *et. al* (2000), have split planned groups into 'concocted' (planned by people and organisations outside the group) and 'founded' (planned by a person or people who are in the group). They also divided emergent groups into 'circumstantial' (unplanned and often temporary groups that develop when external forces bring people together e.g. people in a bus queue) and 'self-organising' (where people gradually cooperate and engage with each other around some task or interest).

On the basis of structure, Smith (2008), posited that groups can be classified into three; Informal, formal and base groups. Informal groups can have a short lifespan ranging from a few minutes to the class period, and are generally created quickly or adhoc, have little structure or format, have new group members with each new class day, and may provide a quick check on student comprehension. Formal groups on the other hand, last several days to several weeks, require more planning as to the size and composition of the group; have greater structure, have a specific purpose (e.g., a particular task to accomplish); and have the same group members throughout their existence. Finally, base groups serve a broader purpose. They last the entire semester (or even several semesters), meet regularly, require planning as to the size and composition of the group, personalise the task at hand by providing support, encouragement, and assistance between group members, and have a constant membership.

Group dynamics is a term coined by the social psychologist Kurt Lewin (1890–1947), to describe the positive and negative forces within groups of people (Dion, 2000). It is commonly described as a system of behaviours and psychological processes occurring within a social group (intra-group dynamics), or between social groups (intergroup dynamics). Gibson and Mitchell (1999), posited that although group dynamics and group process are often used interchangeably, they, however, identified the difference in their meanings when used in group counselling. According to him, while group dynamics refers to the social forces and interplay operative within the group at any time such as the impact of leadership, group roles, and membership participation in groups, group process refers to the continuous, on-going movement of the group toward achieving its goals. It is a means of identifying the stages through which the group passes.

Further, Forsyth, gave a formal definition of group dynamics as:

> ...a field of inquiry dedicated to advancing knowledge about the nature of groups, the laws of their development, and their interrelations with individuals, other groups, and larger institutions (2003, p. 17).

Generally, group formation starts with a psychological bond between individuals. Although the social cohesion approach suggests that group formation comes out of bonds of interpersonal attraction, the social identity approach suggests that a group starts when a collection of individuals perceive that they share some social category ('smokers', 'nurses,' or 'students'), and that interpersonal attraction only secondarily enhances the connection between individuals (Hogg and Williams, 2000). Through interaction, individuals begin to develop group norms, roles, and attitudes which define the group, and are internalised to influence behaviour (Sherif, 1936).

It can, therefore, be said that the main reason why people form groups is physical interaction based upon a common need or problem. The greater the extent to which individuals share activities, the more they will interact, and the higher the probability that they will form a group. Interaction enables people to discover common interests, likes and dislikes, attitudes, and/or sentiments (Bartle, 2007).

There are other important factors which encourage group formation such as:

(a) *Physical proximity:* people who live in the same village are likely to form a group than people who live in different villages;
(b) *Physical attraction:* individuals who are attracted to each other physically might form a group, e.g., young and energetic boys and girls;
(c) *Rewards:* satisfaction of economic and social needs; and
(d) *Social support:* perhaps provided by members of a group in times of crisis.

Classroom Group Process

Classrooms are social settings. Teaching and learning occur through social interaction between teachers and students. As teaching and learning take place, these complicated processes are affected by peer-group relationships. The interactions and relationships between teachers and students, and among students, constitute the group processes of the classroom.

Group processes are especially important under the modern paradigms of education. Group projects and cooperative teamwork are the foundations of effective teaching, creative curriculum, and positive classroom climate. Even in the world of work, interpersonal skills, group work, and empathy are important ingredients of modern business, where employees must communicate well for their business to be productive and profitable. Group processes are also significant in modern global communities, where citizens must work together for a safe and secure world. Thus, along with teaching academic curriculum, teachers are expected to help students develop the attitudes, skills, and procedures of a democratic community.

In the classroom, groups are very important constituents of the teaching-learning processes. It should be noted that most students will be spending a large portion of their work lives in groups. Consequently, groups need to be used to provide appropriate experiences for class members. Stein and Hurd (2000), posit that group and team assignments expand the learning environment beyond the classroom and the teacher. They also allow for socialisation, broaden student participation, and provide opportunities for students to offer and receive help in an academic environment (Zeff and Higby, 2002). Some research has also acknowledged the fact that students might learn more effectively from other classmates than from the teachers (Adams and Slater, 2002). Thus, teachers try to establish an environment in

which opportunities exist for group members to join forces and gain skills, knowledge and understanding from each other. Furthermore, groups help to create loyalties that can motivate students to higher performance and provide experience in interpersonal relations for career development.

Zeff and Higby (2002), also argue that groups allow for interaction among diverse students based on demographic, work experience and educational factors. This planned interaction among students allows them to experience different perspectives, broadening their opportunities to see situations with fresh eyes. The discussions can help individuals develop both problem-solving and critical thinking skills. Results include identification of new problems, a whole array of new solutions and an understanding that there are different ways to perceive a situation. They also assert that interaction with diverse people can provide societal benefits which are observed through the actions taken by people with little or no understanding of others from different cultures. Thus, dialogue among group members can expand comprehension of a topic; and further, develop reasoning skills while providing knowledge of and experience in group dynamics.

In the classroom, groups can be formed to engage students in a project that could not be accomplished by a single student, and teachers expect that students will use their combined resources to complete the assigned task. Students might then meet, discuss and agree to divide up the project so that each member works independently; later, pooling individual contributions into a finished group assignment. Even with minimal coordination, there is a group learning effect that cannot take place when individual assignments are made.

Groups are also established within classroom settings to provide experiential learning opportunities which enhance the understanding of concepts, increase student satisfaction and promote student retention by allowing students to actually try or have hands-on experience with a particular concept (Stein and Hurd, 2000). In fact, the students who have been exposed to group activities in college courses are more likely to understand the complex processes of small group performance demanded by organisational environments (Chesser, 2000).

Zeff and Higby (2002), however, highlighted some disadvantages of using groups in classroom settings. According to them, the group often requires more class time and out-of-class coordination by both the teachers and students. The diverse views may lead to destructive conflicts among group members. For example, social loafing allows not only for a group member to 'coast' but to distort the grades given to students, as they perceive that grades no longer reflect accurately their individual accomplishments. Finally, group activities may result in limited commitment to the efforts made by the group as a whole or to other group members, since individual grades and accountability, even with 'group' grades for the project, are the end results.

Group Process in Counselling

The Group process, in relation to counselling is regarded to mean what happens in the group, particularly in terms of the development and evolution of patterns of relationships between and amongst group participants (American Group Psychotherapy Association, 2007). The process occurs at both observable and inferred levels. Observable processes consist of verbal (e.g. speech content; expressed affects) and non-verbal behaviours that have been conceptualised, operationalised and assessed from fine-grained to very abstract levels of analysis.

Inferred or covert group processes refer to conscious and unconscious intentions, motivations, wishes, and needs enacted by individual participants, dyads, sub-groups or the group-as-a-whole. These processes can serve both adaptive, work-oriented, therapeutic ends or defensive, work-avoidant or resistive purposes. Understanding of group processes contributes centrally to both the successful development of the group itself as a viable and therapeutic social system in which interpersonal interaction occurs; and to the individual learning about self in relation to others. These are the mechanisms through which therapeutic change occurs.

Counselling is sometimes conducted in a group setting. Understanding the nature of group dynamics and approaches to counselling within different group contexts greatly enhances the counsellor's capacity to work with a wider client population. Groups, whether a natural part of life or deliberately established, have dynamics and processes. To effectively utilise the opportunities that such groups provide for personal growth of individuals, as well as for increasing the effectiveness of group functioning, those in the helping professions require an in-depth knowledge of group processes and skills.

Human beings learn about themselves very quickly when they are forced to share their feelings with others, especially if the others are in a similar position. The utilisation of this fact is a therapy called group counselling; also known as group psychotherapy or group therapy. Group counselling is a type of psychotherapy where one or more counsellors attend to a small group of clients. This type of therapy is widely available at a variety of locations, including private therapeutic practices, hospitals, mental health clinics and community centres. Group therapy is sometimes used alone, but it is also commonly integrated into a comprehensive treatment plan that also includes individual therapy and medication.

Group counselling focuses on the group of clients attempting to benefit from sharing their experiences. Group counselling usually tries to address a particular issue, such as anger management or addiction to alcohol. Group counselling is usually led by the counsellor(s), but it is encouraged in a group counselling session that all members of the group contribute in some way. For

a person dealing with an issue, it is likely that they will experience some form of isolation, whether intentional or unintentional. Sharing their experiences in a group, where the other members are experiencing the same issue and isolation, combats that problem, eventually leading to the resolution of the issues; at the very least, clients can use the counselling to overcome the isolation, and the problems that may come with it.

When people come into a group and interact freely with other group members, they usually recreate those difficulties that brought them to group counselling in the first place. Under the skilled direction of a group counsellor, the group is able to give support, offer alternatives, or gently confront the person. In this way, the difficulty becomes resolved, alternative behaviours are learned, and the person develops new social techniques or ways of relating to people. During group counselling, people begin to see that they are not alone. Many people feel they are unique because of their problems, and it is encouraging to hear that other people have similar difficulties. In the climate of trust provided by the group, people feel free to care about and help each other.

Group counselling may be highly organised, with people doing specific activities together and then sharing the results. Alternately, it may be more free-form, where people share current issues related to the group's purpose. One person's verbal contributions to a group might be discussed, validated, and provoke problem solving by other group members in a session. It might also be an entry into a discussion regarding a certain aspect of an illness or condition that is then primarily led by the therapist.

In group counselling, a number of group types are commonly employed. Gibson and Mitchell (1999), highlighted a few of such group types.

1. *T-groups:* These are derivatives of training groups. They represent the application of laboratory methods to group work. It involves making an effort in creating a society in miniature in which an environment is created for learning. These groups are relatively unstructured and participants are responsible for what they learn and how they learn it. The participants learn how people function in groups as well as one's own behaviour in groups. The basic assumption for T-groups is that learning is more effective when the individual establishes an authentic relationship with others. The group's work is primarily a process rather than content oriented. The focus tends to be on the feelings and the communication of feelings, rather than on the communication of information, opinions, or concepts. This is accomplished by focusing on the 'here and now' behaviour in the group. Attention is paid to particular behaviours of participants not on the 'whole person', feedback is non-evaluative, and reports on the impact of the behaviour on others. The

participant has the opportunity to become a more authentic self in relation to others through self-disclosure and receiving feedback from others.

2. *Sensitivity or Encounter Groups:* this is a form of T-group that focuses on personal and interpersonal issues; and on the personal growth of the individual. The emphasis of the sensitivity group is on self-insight which means that the central focus is not the group and its progress but rather on the individual members (Gibson and Mitchell, 1999). Encounter groups consist of between 7 and 20 individuals, getting together with the aim of discarding the inhibitions imposed by the requirements of conventional society; letting their hair down, and expressing their true feelings. The emphasis is on verbal interaction, games, and other activities that encourage open displays of approval, criticism, affection, dislike, anger and tears. Thus, in such a group the individual comes to know himself and each of the others more completely than is possible in the usual social or working relationships. The individual becomes deeply acquainted with the other members and with his/her own inner self, the self that otherwise tends to be hidden. The encounter group meets for several hours a week over some period of months, or it may meet as a marathon group for 24 continuous hours or more, with individuals dropping out for naps. It is thought that the intensity and prolonged time of the marathon group will break down social resistance faster, and accomplish as much as groups whose meetings are interspersed over longer periods of time. The goals of encounter groups include examining one's behaviour and values, learning about people in general, becoming more successful in interpersonal relationships, and developing conflict resolution skills. Concern has been expressed, however, that this group experiences may trigger serious disturbances in some of the more emotionally disturbed participants. To a large degree, their success will depend on the skills of the leader; and the personalities of the people involved, and it would be as well to establish that the leader is properly trained and well respected before joining such a group.

3. *Marathon groups:* use a group technique in which people meet for an unusually long period of time ranging roughly from 6 to 48 hours. An intense emotional atmosphere is created, defences are cut through, feelings and impulses are reached which are inaccessible with other more conventional methods. However, the method has two major drawbacks. First, it can be easily abused by irresponsible therapists

who use it to deal with their own unresolved problems. Second, in cases when marathon groups produce positive therapeutic effects in participants, such effects seem to be only short lived (Wolberg, 1977). The explanation lies in the condition required to achieve lasting psychic change. Breaking through the defences is important, but only as a first step. It has to be followed by the individual or the group-as-a-whole working through the maladaptive patterns, making the right links and finding new ways of relating, thinking and being. In short, marathon groups can help to achieve the first step. In order to be therapeutically effective, they have to be followed up by therapeutic workings.

4. *Task Groups:* these are groups organised to meet organisational needs through task forces or other organisational groups or to serve individual needs of clients through such activities as social action groups. These groups are frequently useful to organisations seeking ways to improve their functioning.

5. *Psycho-education group:* this type of group emphasises cognitive and behavioural skill development in groups structured to teach these skills and knowledge. Psycho-educational groups are used for guidance in counselling or therapy-oriented activities.

6. *Mini-groups:* this term has become increasingly popular in recent years to denote a counselling group that is smaller than usual. A mini-group usually consists of one counsellor and a maximum of four clients. Because of the smaller number of participants, the potential exists for certain advantages resulting from the more frequent and direct interaction of its members. Withdrawal by individuals and the development of factors or cliques are less likely in mini-groups.

7. *Social networks:* although this is not a group in formal sense, social networks result from the choices that individuals make in becoming members of various groups. As counsellors, we may be concerned with how these choices are made and their impacts on the individuals. Sociologists engage in social network analyses to determine the interconnectedness of certain individuals in a society and how these in turn produce interaction patterns influencing others both within and without the network.

It should be noted that not all group counselling efforts are completely successful. Occasionally, group therapy suffers if a group is too large or small. Group therapy may also become problematic when one person appears to monopolise the group. Group counselling usually works best when an experienced counsellor redirects a person who is sharing too much, and allow

equal time for people to share their ideas, problems or opinions. People may vary in their need for therapy, and generally those who monopolise a group should not be despised but should be redirected to private counselling, where the person is the sole focus of attention. After some time in private sessions, a person may feel less need to monopolise a group counselling session.

Group Counselling

This is a form of counselling people with similar experiences/issues who come together with a professional counsellor. It involves more than one person (usually six to eight individuals) meeting face to face to share their struggles and concerns with the facilitation of one to two trained group therapists. One of the main principles behind group counselling is, meeting other people who are dealing with something similar and hearing their story which lets people know that they're not alone. Things like depression or bereavement can be really isolating; and make one feel like he or she is facing the whole world alone. Group counselling can be a good way of getting over those feelings of isolation, and realising that there are other people in a similar situation.

Gibson and Mitchell (1999), attempted to distinguish between group guidance, group counselling and group therapy. Group guidance refers to group activities that focus on providing information or experiences through a planned and organised group activity. Examples may include; orientation groups, career exploration groups, college visitation day groups and classroom guidance groups. Group guidance is also sometimes organised to prevent the development of problems. The content could include educational, vocational, personal or social information with a goal aimed at providing students with accurate information that will help them make appropriate plans and life decisions.

On the other hand, group counselling involves the routine adjustment or developmental experiences provided in a group setting. Group counselling focuses on assisting the counsellees to cope with their day-to-day adjustment and developmental concerns. Examples might focus on behaviour modification, developing personal skills, concerns of human sexuality, values or attitudes or career decision-making while group therapy is the approach which provides intense experiences for people with serious adjustment, emotional or developmental needs. Therapy groups are usually distinguished from counselling groups by both the length of time and depth of the experiences involved. Therapy group participants often are individuals with chronic mental or emotional disorders requiring major personality reconstruction. Important aspects of group therapy sessions are to provide a safe environment in which to foster a level of trust between participants, so that they may talk personally and honestly to and about themselves and each other. It involves making a commitment to the group and to the confidentiality of the sessions and the material disclosed at the sessions.

According to Gibson and Mitchell (1999), the importance of group membership to the achievements and adjustment of individuals in the group cannot be overestimated. The authors highlighted some criteria for the selection of group members to include common interest, volunteer or self-referred, willingness and ability to participate in the group process. They posited that group counselling should be an option chosen by the participants as this guarantees client's rights and, further, enhances the motivation for counselling should the client decide to be in a counselling group. Nystul (1999), posited that pre-group interview is utilised to help screen and orient prospective group members; and described four steps that could be used in conducting such pre-group interviews: identifying needs, expectations and commitments; challenging myths and misconceptions; conveying information; and screening. Qualities commonly sought in individual counselling also apply to groups, these include high motivation, adequate ego strength, satisfactory relationship with other individuals, presence of an acute problem and realistic expectations (Burlingame and Fuhriman, 1990).

Nystul (1999), described four stages across which common group counselling activities are actually operationalised:

Stage 1: The initial stage, involves screening, orientation and determining the structure of the group. The major functions of the group leader at this stage are to establish ground rules and norms of the group, helping members to express their fears and expectations, being open and psychologically present, assisting the group members to identify concrete personal goals and sharing expectations and hopes for the group. During this stage, members attempt to create trust; learn to express their feelings and thoughts, including fears or reservations about the group; become involved in establishing group norms; and learn about the dynamics of the group process. The group counsellor should note that in the initial group sessions, the general climate of the group may be a mixture of uncertainty, anxiety and awkwardness as it is not uncommon for group members to be unfamiliar with one another and uncertain regarding the process and expectancies of the group regardless of previous explanations or the ground rules earlier established (Gibson and Mitchell, 1999).

Stage 2: The transition stage, is characterised by the time when group members experience anxiety and defensiveness as they begin to question the value of the group. The major functions of the leader at this stage are to express their anxiety, dealing openly with conflicts that occur in the group, and helping group members become independent. Group members on the other hand become concerned about being accepted by the group. Members at this stage must recognise and express feelings of resistance toward the group process. Gibson and Mitchell (1999), warned that as members attempt

new patterns of behaviour and new approaches to group goals, differing perceptions as well as differences in solutions generated by the individual members, can lead to a range of behaviours from normal discussions to active and open confrontations. The counsellor must strive to keep the discussions in-bounds and prevent them from becoming personal attacks on individuals' values and integrity.

Stage 3: The working stage, it is a stage that occurs when group members feel free to explore their thoughts, feelings and work on their concerns. At this stage, a clear progression toward productivity is noted. The major functions of the leader are to encourage members to translate insight into action, and help them make the necessary changes to achieve their goals. The group members on the other hand introduce personal issues that they are willing to discuss and provide and receive feedback, applying what they learn to their daily lives and offering support and encouragement to other group members. Gibson and Mitchell (1999), suggested that at this stage, group members would have recognised the inappropriateness of their past behaviours and begin to try out their selected solutions or new behaviours such that progress is made toward the realisation of their individual goals. They also advised that although, general success with the new behaviours may provide sufficient reinforcement for many members to continue, for others a support base of significant others outside the group should be developed to facilitate the maintenance of the change once the counselling group is terminated.

Stage 4: The final stage, is characterised by the time when members are offered smooth transition toward termination of the group. The major functions of the group leader are to assist the clients in working toward termination, providing opportunities for them to receive additional counselling, if necessary, and help them gain a useful understanding of what they have learnt. At this stage, members may begin to reduce their intensity of participation to prepare for termination, evaluating their experiences in the group. According to Gibson and Mitchell (1999), termination like all other phases or stages of the group counselling experience, also requires skill and planning on the part of the group counsellor. Termination is most appropriate when the group goals and the goals of the individual members have been achieved and new behaviours or learning have been put into practice in everyday life outside the group. Groups may also be terminated when their continuation promises to be non-productive, harmful or when group progress is slow and long-term continuation might create over-dependence on the group by its members.

For group counselling to be a success, the group leaders must be an effective one. Such a leader is expected to possess expected requisites such as personal qualities which would enable the group to move toward success. Gibson and

Mitchell (1999), highlighted some of them to include: courage, willingness to model, presence, goodwill and caring attitude, belief in group process, openness, non-defensiveness in coping with attacks, stamina, willingness to seek new experiences, self-awareness, sense of humour as well as personal dedication and commitment.

Conclusion and Recommendations

From the foregoing, it can be seen that with a good understanding of the sociology of counselling, a client will enhance the successful accomplishment of tasks in group counselling. In this era of population explosion in schools and developing countries, group counsellors will be able to develop the requisite skill for the delivery of counselling support to many more students at a given time if the understanding of the sociology of the clients is properly understood.

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CHAPTER 4

Childhood: Theoretical Perspective and Socio-Cultural Construction

Roland Nawa Muchanga and Kalima Kalima

It goes without saying that Sam will not enjoy his childhood. That is not the point - childhood is not an end in itself, but a means to growing up.

Roger Scruton, philosopher and conservative columnist, talking about his 4-year old son *(Independent* 10 May, 2002*)*

Abstract

This chapter explores the concept of childhood and how it is constructed from the socio-cultural perspective based on existing research literature. Based on the theoretical understanding of the concept of childhood, it highlights the different perspectives of childhood on the basis of age range, social, cultural and history as they help shape the child into adulthood. In the first place, the chapter discusses the issue of childhood from a theoretical point of view by looking at the age range and how the concept of childhood is understood; its boundaries, its importance and its historical theories. In the second place, the chapter dwells on the socio-cultural construction of childhood. The major key finding gathered from the debate from varied authors on the term of childhood is that, it can be seen as a constantly evolving series of steps toward adulthood shaped by vast array of forces and ideas, that range from ethnicity to class, from region to religion, from culture to culture and from gender to politics. Equally, another key finding is that, the term 'childhood' is socially constructed. It is a belief that the way we think about childhood is drawn from the society we live in, the time we grew up, and the culture we are a part of. However, the idea differs through time periods, and from culture to culture. From the arguments, it has been observed that

the idea of 'childhood' was not around in feudal times, around the 1700s. From the discussion, it has been concluded that, childhood is a recent invention that is based on the socio-cultural expectations, responsibilities and chores placed upon the child by society. It is important to be aware of these factors as they help shape the child for future responsibilities and an independent adulthood . At a broader level, the problems seen in society which may be understood as products of childhood, have been through his or her infancy.

Keywords: childhood, socio-cultural, construction

Introduction

There has been much discussion about the different constructions of children and childhood over the past decades (James et al., 1998; Jenks, 2005; Mayall, 2002; Qvortrup, 1994). The questions about childhood and its meaning are the ones that have pre-occupied historians in recent years. The debate has been on whether or not our current idea of childhood is just a recent invention, an 'artefact of modernity'. The main purpose of this chapter, therefore, is to discuss the concept of childhood and its construction in the 21st century. The chapter will first focus on the discussion of the theoretical point of view of the concept of childhood. Under this debate, an endeavour will be made to scrutinise the theoretical boundaries of childhood, its importance and the historical events evolving. The remaining part of the chapter will be devoted to discussing the socio-cultural construction of childhood under which the role of socialisation of the child will be explored.

Understanding the Concept of Childhood: Theoretical Perspective

Childhood is an abstract concept, thought to be either a natural biological stage of development or a modern idea or invention (Hendrick, 1997). Thus, the theories of childhood are concerned with what a child is, the nature of childhood, the purpose or function of childhood, and how the notion of the child or childhood is used in society. The concept of childhood, like any invention, was forged from a compelling relationship between ideas and technologies within a frame of social, political, and economic needs (Jenks, 2005). According to Postman (1994) theories of childhood as a concept are often highly coloured or poignant, that is, they deal with stark contrasts revealing the development over-time of the psychological or emotional significance of childhood as viewed from the state of adulthood.

Theoretical Precincts of Childhood

The term childhood, according to Howard (2008), is non-specific and can imply a varying range of years in human development. Howard (2008), further states that, developmentally and biologically, childhood refers to the period between infancy and adulthood. In common terms, therefore, childhood is viewed as starting from birth. Though some consider that childhood, as a concept of play and innocence, ends at adolescence (Boehmer, 2004). In the legal systems of many countries, nevertheless, there is an age of majority when childhood officially ends; and a person legally becomes an adult. The age ranges from 15 to 21, with 18 being the most common (Cohen, 2006; Howard, 2008).

Howard (2008), contends that, early childhood follows the infancy stage and begins with toddlerhood, when the child begins speaking or taking steps independently. While toddlerhood ends around age three when the child becomes less dependent on parental assistance for basic needs, it is believed that early childhood continues approximately through the years seven or eight. According to the National Association for the Education of Young Children (NAEYC), (Palmer, 2006), early childhood spans the human life from birth to the age of eight. At this stage, children are learning through observing, experimenting and communicating with others. Adults supervise and support the development process of the child, which leads to the child's autonomy. During this stage, a strong emotional bond is created between the child and the care providers.

Middle childhood begins at around age seven or eight, approximating primary school age and ends around puberty, which typically marks the beginning of adolescence (Cohen, 2006; Howard, 2008). In this phase, children attend school, thereby developing socially, mentally and physically. They are at a level where they can make new friends and gain new skills which will enable them become more independent and enhance their individuality.

According to Bee and Boyd (2010), adolescence is usually determined by the onset of puberty. However, puberty may also begin in pre-adolescents. Bee and Boyd (2010), further state that, the end of adolescence and the beginning of adulthood varies by country and by function, and even within a single nation or state or culture, there may be different ages at which an individual is considered to be mature, either chronologically and legally old enough to be entrusted with certain tasks by society.

Childhood can also be considered as a historical construct. Saraga (1998), argued that childhood can be defined as a constantly evolving series of

steps toward adulthood, shaped by a vast array of forces and ideas, ranging from ethnicity to class, from region to religion, and from gender to politics. Historians, according to Mayall (2002), have tended to focus on two fairly distinct, if imprecise, phases of growing up: childhood and youth. The former suggests a time of innocence, freedom from responsibility, and vulnerability. The latter includes, but is not necessarily restricted to adolescence, and is normally characterised as a period of coming of age, when young people begin taking on the responsibilities and privileges of adulthood. Therefore, childhood suggests a period of shared expectations and closeness between parents and children. Meanwhile for the youth, it connotes a period of conflict between the generations.

Jenks (1982), is of the view that, the theoretical boundaries drawn between the relative states of childhood and adulthood have historically been highly significant across a range of cultures for social, political, religious, and legal purposes. De Mause (1995), further argues that, the status of a *child* is to be awarded protection, and acknowledged with distinct limitations of personal responsibility within a context of parental or community belonging. A child has been defined as any person below a notional age of the majority, but this has been variously interpreted and there have been many differences throughout history in the ways that societies have come to recognise the exact beginning and end of childhood. The United Nations Children's Emergency Fund (UNICEF) has, for its purposes, identified childhood as that stage of life experienced by any person between birth and fifteen years. However, Article 1 of the 1989 *United Nations Convention on the Rights of the Child (UNCRC),* states that a child is any person under the age of eighteen (Giroux, 2001).

Childhood has thus been identified as a stage of life, associated with chronological age, located between infancy and youth, which includes adolescence. For instance, Howard (2008), pointed out that, the term childhood is non-specific and can imply a varying range of years in human development. Developmentally and biologically, it refers to the period between infancy and adulthood. In common terms, childhood is considered to start from birth. Some consider that childhood, as a concept of play and innocence, ends at adolescence. The word, *child*, has been used in many societies to indicate a kin relationship but also to indicate a state of servitude. But, biological determinants have not always been paramount in indicating childhood. Children in the past often lived with and belonged to households rather than their biological parents (Qvortrup, 1994). The beginning of childhood has been considered variously to occur at birth or at the end of breast-feeding, for example, which lasted sometimes until the age of three in medieval Europe or in pre industrialised societies of modern times (Bogin, 1999; Sommerville, 1982). Sommerville (1982), asserts that, Medieval European society considered

infancy to end at around seven years, coinciding with the beginning of a young person's competency at performing certain domestic or industrial tasks. At that time, the educational framework which modern societies have come to draw upon in distinguishing stages of infancy and childhood was yet to be invented. The eighteenth-century philosopher Jean-Jacques Rousseau (1712–1778), in constructing an ideal childhood, described what he termed the 'age of nature' as occurring between birth and twelve years. For the Austrian-born philosopher, Rudolf Steiner (1861–1925), childhood was a state of physical and spiritual being roughly between the ages of seven and fourteen years, indicated initially by certain physiological changes such as the loss of the milk teeth (De Mause, 1995; Elkind, 2007).

Biological-anthropologists, taking a bio-cultural perspective, regard childhood as a stage in development unique to humans, the function of which is the preparation for adulthood (Panter-Brick, 1998). However, advocates of a new sociology of childhood such as sociologist Alison James (James and Prout, 1990), have pointed out that chronological age is sometimes of little use when comparing childhood across very different cultures and societies. A ten year old may be a school child in one society and the head of a household in another. The latter scenario is common today in the face of the HIV/AIDS epidemic, where children at a tender age start to take care of their siblings upon the death of their parents. Therefore, the new sociology of childhood prefers to identify a 'plurality of childhoods' rather than one structural conditional term. This plurality, it has been argued, is partly reflected through the prism of children's own definition of themselves.

Legal definitions of childhood have emerged gradually over time and during this long evolution the law can be seen to have reflected changing understandings of the meaning, span, and significance of childhood. Medieval English common law (Cunningham, 1991) indicated, through its recognition of ages of majority, that a child was considered incapable or lacking sufficient means of carrying out a range of adult practices. The capacity of the individual to know and reflect upon the moral status of their actions has come to denote the capacity of belonging and contributing to civil society. The age at which a person can be considered capable of moral reflection upon their actions, has transformed over time according to changes in the understanding of childhood. For example, according to the nineteenth-century English common law, it became established that children should be exempt from criminal liability under the age of seven. This was raised to age eight in 1933 and to ten in 1963 (Cunningham, 1991).

According to Cunningham (2006), the requisite of formulating a precise legal definition of childhood grew out of demographic, economic, and related social and attitudinal changes in the industrialised world that forged a new

recognition of the significance of childhood at the end of the nineteenth century and the beginning of the twentieth century. Before this time, it is believed, children had been defined in strict relation to their status as the biological offspring of fathers who also were considered by law to own any of the child's possessions and to whom they were obliged to offer their services. The modest status of children for instance, was reflected in the fact that child theft was not acknowledged by English law before 1814. By the end of the nineteenth century, therefore, there was a growing concern among the newly formed middle class with the moral condition of childhood and the domestic responsibility of parents (Cunningham, 2006; Cross, 1997). Related to this was a notion of childhood innocence and vulnerability which was employed to argue for a new definition of childhood – one which associated it less with the world of industry and more with the world of education. Notions of protection and welfare developed strongly in parts of the world which were experiencing, for the first time, reductions in infant and child mortality. This saw a paradigm shift from industry to a more protective and safe world for childhood.

The Importance of Childhood

There are two broad theoretical positions that have emerged on the importance of childhood. One view postulated by Panter-Brick (1998), for example, suggests that childhood is a characteristic of human evolution designed to ensure the survival and development of the species. The other view by the same author suggests that, the state of childhood or how childhood is seen is significant in itself as an indicator of the evolution or development of societies and cultures toward notions of civility or modernity. The former, which encompasses the *bio-social* and *evolutionary* approaches, argues that childhood, as a stage of growth and development, has evolved in human society to provide the circumstances for optimising the prospects of maturity. In particular, this perspective has suggested that the distinctively rapid growth of the brain; and the immaturity of dentition and digestive tracts characteristic of the early stages of human life, have evolved over time to sustain human society. Such a view is unswerving with an essentialist or universal view of childhood (that prioritises biology over environment in explaining childhood) but has also recognised that social conditions and ecology play a part in constructing the social and cultural response to childhood (Qvortrup, 1994). Somewhat related to bio-social theories, the perspective of evolutionary psychology came to regard childhood as directly linked to the evolution of what has been called a psychology of parenting. This theory, according to Bogin (1999), proposes that certain universal characteristics of infants and young children, such as relatively large heads and eyes in small bodies, act to trigger instinctive

emotions and responses in adults, consequently securing development toward maturity.

Social constructionists, therefore, argue that human beings actively and creatively produce society. In this regard, the understanding of children is that, they are not the same everywhere, and they are different from adults; how different they are, and the expectations placed on them differ depending on the society they live in.

From this point of view, childhood can be seen as a relationship and, therefore, can be understood in generational terms. The principle relationship of childhood is with adulthood, but more specifically with parenthood (Cahan, Sutton-Smith and White, 1993). The development or evolution of conscious parenting is the focus of a school of thought known as *psycho-history*, which has developed since the 1970s following the work of (De Mause, 1995). De Mause and his associates have developed a distinctive and controversial theory of childhood. This position establishes from empirical evidence that childhood, while seemingly held by society to be a time of freedom and innocence, has been for the majority of children a time of oppression and abuse. De Mause has argued that the parental response to the infant or child has evolved over time from one which was generally abusive and cruel to one which became nurturing and affectionate (Cahan, Sutton-Smith and White, 1993; De Mause, 1995). Such a development, according to this theory, not only reflected social, technological, and cultural change but indeed generated those changes.

For Sigmund Freud (1856–1939) and psychotherapists who have followed Freud, such as James and Prout (1990), childhood was of key connotation in the adjustment of the individual to mature. Freud developed his theories of the sub-conscious partly through considering the reasons early childhood memory becomes lost. Since childhood was regarded as the key stage in the successful, or unsuccessful, development of ego, psychological well-being in adult life hinged on this period of time and healing might be effected through the recall of repressed childhood experience (Bogin, 1999; James and Prout, 1990). Another perspective of childhood is from the histories of childhood.

Histories of Childhood

The questions about childhood and its meaning are ones that historians have had concern with in recent years, most obviously in the debate about whether or not our current idea of childhood is in fact just a recent invention, 'an artefact of modernity'. Some writers (Elkind, 2007; Postman, 1994; Sommerville, 1982), have argued that up to the modern epoch, the current idea of childhood simply did not exist. This view holds that sometime between 1600 and the twentieth century, the idea of childhood was 'invented' and what is now thought of as childhood, would not have made sense to our ancestors. This view is most strongly associated with the French author, Philippe Aries, whose book,

Centuries of Childhood: A Social History of Family Life, first published in the 1960s, has dominated debates on the history of childhood ever since (Elkind, 2007; Postman, 1994; Sommerville, 1982). A more detailed understanding of childhood has been arrived at from discussions by many historians who traced the development of the concept of childhood and its different interpretations. Much of this debate has involved historians identifying evidence to show Aries and his co-thinkers to be wrong about the historical facts. However, the debate has focused people's attention on previously neglected areas of history and allowed for the development of the history or childhood as a serious area. In the following section, we discuss the propositions of childhood by Philippe Aries and other historians.

Philippe Aries, a French historian, was associated with a school of history which attempted to alter attention from what might be seen as traditional history, toward aspects of everyday life such as family life (Shahar, 1992). This viewpoint stresses the importance of accepting how people saw their own lives and how ideas and feelings change over time throughout their lifespan including childhood.

Aries took the view that the modern world had seen a transition in people's ideas about childhood. Put plainly, in medieval society, young people about the age of seven, moved out from the protection of the family into a broader adult society where they acted as smaller versions of the adults around them (Shahar, 1992). By contrast, however, in modern society, the age of seven did not mark a gradual move from infancy to childhood, which was a special state of transition, infant nor adult, around which the whole structure of the family revolved. As Shorter (1977) claimed, the modern world was characterised by a separate isolated family unit which was centred on the needs of the child. This idea of the child-centred family is so familiar to us today that we find it hard to imagine that it is a recent invention. But Aries argues that it is only modern changes, particularly the development of schooling prescribed and provided by the state, which brings about the phase we call childhood. In his most extreme and controversial claim, Aries states, '…in medieval society the idea of childhood did not exist' (Aries 1960: 125 cited in Clarke, 2008, p. 4). His conclusion was based on his medieval writing on age and development, the portrayal of children and childhood in medieval art, children's dressing and the type of games children played.

This, therefore, led Aries to develop his claim. His study of medieval painting suggested that in early medieval art, children tended to be shown as if they were small versions of adults (Hendrick, 1997). The most common portrayal of a child in medieval European art, as Clarke (2008) observed, was the picture of Jesus in innumerable paintings of the *Madonna and Child*.

Aries emphasises that, these portrayals show Jesus as a small version of an adult, the faces have very 'grown up' features and the bodies are elongated and developed like adults (Clarke, 2008; Hendrick, 1997). Only the size

indicated that a figure was that of a child. This suggests that medieval artists saw children as simply 'reduced' versions of adults. Aries says,'…medieval art until the twelfth century did not know childhood or did not attempt to portray it' (Aries 1960: 31 cited in Clarke, 2008, p. 5). This view is reinforced, says Aries (in Clarke, 2008), by the study of medieval children's clothing, which were generally simply smaller versions of what was fashionable for adults. Infants wore baby clothes which were generally the same for boys and girls, but at about the age of seven, people moved on for smaller versions of adult outfits.

Clarke (2008), is of the view that possibly and most controversially, Aries and other historians associated with his view have tended to see childhood in medieval times as having less emotional loading of significance to their parents. The proposition being that, parents, especially fathers, were less emotionally tied to children and were less affected by the impact of children's illness or death.

From the seventeenth century onwards, Aries (Clarke, 2008; Pollock, 1983) affirms that, our conception of childhood in the modern sense begins to develop. This is reflected in art; for instance, by the commencement of the representation of ordinary children in everyday situations and even the portrayal of dead children. This is described as'… a very important point in the history of feelings' (Aries 1960: 352 cited in Clarke, 2008, p.5). This change in sentiment takes two forms: firstly, within families children take on a more central role, 'parents begin to recognise pleasure from watching children's antics and ' coding ' them' (Aries 1960: 127 cited in Clarke, 2008, p. 5). Secondly, among moralists and writers on social life, there emerges an idea of children as fragile beings who need to be safeguarded and reformed (Pollock, 1983). The implication being that, neither of these sentiments had been common before 1600 (Shahar, 1992). Their development in the seventeenth century lays the foundation for modern views of what childhood is. The crucial role in this development, for Aries, is played by the development of schooling, claims Clarke (2008). Schooling is seen here as providing a kind of a restricted period for children between infancy and adult life, and its gradual extension, and increase is the basis for defining a new idea of childhood.

It is important before moving on from Aries to note that his work is essentially about ideas, not about the reality on the ground. He writes about childhood, not children, and what he is trying to do is to construct a history of the way people think about the idea of childhood rather than how individual children were brought up or treated.

Aries' work was extremely dominant in generating new ideas about children in history. In particular, his ideas fed into a growing body of theory which saw the family as progressing from an institution based on practical needs and economic necessity, with little or no emotional content, to the modern idea of

the family as the institution which meets the needs of its members, especially children, for love and affection (Anderson, 1995; Cunningham, 2006).

The French writer De Mause, for instance, showed the history of childhood as a progression from classical times, where children were frequently killed or abandoned, through medieval indifference, where wet-nursing and the 'farming out' of children were common, to the present-day emphasis on caring (Shorter, 1976). Shorter (1976: 170) goes further to suggest that, '… good mothering is an invention of modernisation'… and that, in traditional societies, infants under the age of two were treated with emotional indifference because of the high possibility of infant mortality, while in the twentieth century, the welfare of the small child has been given a dominant status in public discourse.

Stone (1979), points out that, as late as the seventeenth century, relations within the family were remote and emotionally detached and that the Puritans held a pessimistic view of the child as a sinful being whose will had to be broken by flogging and denial. Only with the growth of the middle classes and the stress on individualism which came with industrialisation, did a child-centred view emerge, gradually filtering down from the middle class to the rest of society (Roberts, 1994).

Although the above historians differed from Aries in matters of chronology and detail, they shared a key standpoint, what Anderson (1995) calls the sentiments approach. Their argument is that, the significant change which arrived with modernity was a shift in the way people felt about children, that is, an alteration in their emotional meaning and significance. This move was widely seen as one from unresponsiveness or neutrality to high estimation. The twentieth-century family is seen as child centred and focused emotionally on the welfare of the child in ways that these writers claim would have been unrecognisable to people from previous centuries.

According to Burke (2009), the thought of a universal state of childhood was challenged toward the turn of the twenty-first century through an increasingly globalised perspective which accompanied scholarly questioning through ethnographic, cultural, and anthropological studies. The notion postulated being that, the swing toward a recognition and acceptance of children's voices in determining their own world-view, brought about a disjointed view which questioned the structural norm of childhood. This view brought about a theoretical position about pluralities of childhood. Theorists such as Chris Jenks and Jens Qvortrup (Burke, 2009), claim that it is more accurate and helpful thus to talk of many childhoods or a plurality of experience both across cultures and within them. Therefore, diversity of experience according to class, ethnicity, gender, and culture, place of residence, health, or disability rather than one common childhood is emphasised, in spite of growing recognition of the universalising effects of globalisation. In addition to this view, childhood is also seen as a socio-cultural construction.

Childhood as a Socio-cultural Construction

Childhood must be seen as a recognisable component of all social structures across space and time. It is a specific social structure constituted by the adult society that socialises children in order to maintain it; theories of social order, social stability and social integration depend on these processes (James, *et al.*, 1998). It is argued that, in all societies, children require some specific training to prepare them for the adult life. This preparation is believed that it happens by the processes of socialisation and learning. These types of practices can be carried out by different members of the social group with different age and gender identities. For instance, through socialisation and the learning processes, children receive information and knowledge about the way of life within their society. Socialisation being defined as '... the process whereby children acquire knowledge about the language, values, etiquette, rules, behaviours, social expectations and all the subtle, complex bits of information necessary to get along and thrive in a particular society' (Zatrow and Kirst-Ashman, 2007: 152). It is also stated that, although socialisation continues throughout life, most of it, however, happens in childhood. In the socialisation literature, the parent, particularly the mother, almost universally has been described as the major agent socialising the child (see, for example, Lerner, 2002). This model depicts the mother as the primary source of developmental knowledge and guide for the child. African children (Nsamenang, 1999), are compelled by the harsh realities of their circumstances to survive and make progress through their own agency. The evidence for such agency according to Nsamenang (2008a), is better sought within African family traditions and peer cultures rather than in school settings or academic institutions, though versions of it are to be found therein. Much of African children's contribution to sibling or peer care giving and self-learning occurs primarily through social exchanges and distributive norms in the different social sectors and activity settings in which the young engage.

Mwanakatwe (1974), for instance, observed that, in the tribal society, the education of children was an important function that was shared by parents and the neighbours. He further says, in fact, it was all reasonable persons of any age group that assumed some responsibilities for training children in specific skills or in promoting their understanding of the laws and customs of the tribe. Muchanga (2013), also noted that it was the parents that were generally responsible in collaboration with their grown-up children and close relatives, when it came to educating their children, more especially during the early years of its infancy. As Mwanakatwe (1974) put it, in the early stages, the young children's education was centred on learning the language of their parents and identifying objects in common use in the household. According to Snelson (1990: 1), 'Education is a condition of human survival. It is the means whereby one generation transmits the wisdom, knowledge, and experience

which prepares the next generation for life's duties and pleasures'. It was until the age of three (3) years that the child's world was a restricted one in which his or her associates were his or her own mother, his or her nurse and siblings, if any. All the members of the family had a responsibility in the upbringing of the child.

A significant problem in defining childhood is its flexibility, not because its definition depends on the socio-cultural context of different societies, but because social meaning shares certain chronological characteristics with biological growth, as certain rites of passage demonstrate (Grimes, 2000; Holm and Bowker, 1994). Inevitably physiological changes or growth and maturation occurring throughout the life course are culturally negotiated and incorporated into social life. As a process, for example, ageing is both universally and culturally specific in its social and material expression, while biological immaturity is regarded as universal. Childhood is considered a social and cultural phenomenon with spatial and historical variability (Prout, 1999). Therefore, one can consider that the two forms of childhood, that is the biological child and the social child, can be defined very differently among cultures.

James *et al.* (1998), points out that, childhood is not a stage but rather a course of action, a coherent social practice; it is not an analytical category but rather an empirical phenomenon. In the past, children have been considered passive members of societies and perceived only in relation to adults and adult's activities. However, they are not pathological or incomplete; they are social actors and operate in everyday life (James *et al.* 1998). As is the case with adults, children play a significant socio-economic role in societies and consequently, it would help to know more about the contribution of children, their activities and behaviours within societies (Romero, 2004).

Childhood is a socially constructed category, and one must be concerned with its historical and cultural specificities which reveal that the socio-cultural context varies significantly; they are not essential forms or constraints, and do not exist in a finite and identifiable form, neither in historical periods (Aries, 1962; cited in Anderson, 1995), nor in ethnographic contexts. Nevertheless, their manifestations vary from society to society, but it is still possible to understand the characteristics of social facts, because they are uniform within each particular society.

Nsamenang (2008b), is of the view that the idea of the social construction of childhood carries immediate relevance to and utility for acknowledging and upholding the huge variety of childhoods found throughout the world. However, Nsamenang (2004; 2008b), suggests that, this viewpoint is hardly ever cited nor articulated in policy statements and service programmes by practitioners and other actors in the field of early childhood. Nsamenang (2003), further maintains that in its place, the mainstays of the early childhood minders and landscape remain mainstream psychology and child development perspectives that continue to focus on an image of the 'global child' that is

Western-derived. As a result, as Pence and Hix-Small (2007), puts it, the early childhood that is actively being promoted by the development community in the Majority World is a product of European and North American culture, which represents only a minority of the world's early childhood in a multicultural universe in need of discovery.

According to Jenks (2005: 12) 'Childhood is to be understood as a social construct'. Comparative and cross-cultural analysis shows a multiplicity of childhoods rather than a single and universal phenomenon (Prout and James, 1990). Childhood as constructed in the West has been understood as '…a protected realm…' (Golden, 2005: 79), a point elaborated by Stephens (1995: 4),'… modern children are supposed to be segregated from harsh realities of the adult world and to inhabit a safe, protected world of play, fantasy and innocence'. Cultures construct childhood to instantiate their recognition of a maturation process in human offspring. The social construction of childhoods (Prout and James, 1990) also mirrors variations in the extent to which cultures impute incompetence and completeness or incompleteness to the nature of the child. The immaturity of children is a biological fact, but the ways in which this immaturity is understood and made meaningful are a fact of culture (La Fontaine, 1986).

Cultures impose their own curricula onto the biology of human development. Stated differently, various cultures may recognise, define and assign different developmental tasks to the same biological agenda (Nsamenang, 1992). In spite of the enormous variation across cultures in the perception of children's needs and childcare arrangements to satisfy them, the Convention on the Rights of the Child (CRC) recognised the family as the most appropriate societal institution to best serve the interests and needs of children. Family types and their composition however, vary by culture and social class, and probably by the tolerance level or parental or policy permission of children's participation in domestic chores or in sibling and peer group sociability (Nsamenang, 2008a; Zimba, 2002).

Conclusion

The arguments advanced in this chapter from the debate about the concept of childhood, and how it is constructed, have shown that childhood is an example of a social construct as it is not a natural or a biological state, but being socially constructed. This is because social construct implies a socially created aspect of life. Childhood has been shaped by culture and society to have a specific meaning. As a result, the ways children are brought up, the length of time childhood should last, and the behaviour considered to be fitting for children, are examples of aspects of childhood that are socially constructed. Even cross-cultural evidence supports the view that childhood is a social

construct. If it were an ordinary state, it would be found in all societies. This also relates to how children are seen to be young adults. According to the French historian Phillipe Aries, childhood is a relatively recent discovery. It is a separate and distinct phase of life and that children should be treated separately from adults. Before the 1600, however, the idea of childhood didn't exist. For instance, children dressed like adults, mixed with adults and played an economic role as soon as they were physically able. They were viewed as economic possessions rather than a representation of people's love for one another.

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CHAPTER 5

Mentoring as a Tool for Quality Assurance in Teacher Education: The Case of Zambia

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Abstract

The core issue of this article is to argue for a new perspective on the need for mentoring of novice lecturers in teacher education as a tool for ensuring quality assurance. The article explores, identifies and considers various and pertinent explicit or implicit aspects of novice lecturer mentoring in teacher education. The first part of the article argues that formal mentoring of novice lecturers in teacher education can help in promoting the newcomer's career advancement, personal growth and development and education through a person-centred approach. The areas in which novice lecturers need mentoring include: pedagogy, assessment tools, designing appropriate curricula, research, publications, presenting conference papers, professional ethics, and so on. The next section of the paper addresses the multiple challenges novice lecturers face which, if not managed and controlled, can lead to substandard performance among novice lecturers. One of the most important challenges that can impact on the quality of teaching is the lack of pedagogical skills. It is, therefore, essential that novice lecturers are given maximum support and encouragement by their seniors. The final section describes the need for the institutionalisation of mentoring; and the strategies which include capacitating potential mentors through training, reducing the workload of senior staff, and offering monetary and other incentives. The author concludes that mentoring is the best tool for supporting the quality of performance of novice lecturers.

Keywords: Mentoring, challenges, novice lecturer, pedagogy, collegiality

Introduction

Mentoring in teacher education as a quality assurance process within the wide understanding of total quality management has many benefits for educational institutions. In countries such as Israel, the debate has shifted from quality issues to concerns with total quality management in which the attention is no longer on the inputs, but on the processes of education (Koul, 1997). In different ways, organisations worldwide are trying to find new ways of assuring quality, and this paper argues that mentoring of novice lecturers is one of such viable and proven approaches. Yet, in Zambia and most African countries, mentoring at tertiary level is missing. This paper, therefore, presents the Zambian case as a prototypical African country. As they have expanded, and overwhelmed by the enrolment figures, many universities in Zambia have found themselves with unfathomable levels of novice lecturers to handle the huge demand. This has huge implications for universities, particularly public universities which operate within a general policy framework articulated by the Government.

The Ministry of Education (1996: 97), argues in its policy framework *Educating Our Future; National Policy on Education*, that academically in Zambia, like elsewhere around the globe, universities through their own efforts must attract respect and recognition, and that:

> ...each university is responsible for determining its own programmes of instruction at all levels... Each university engages its own staff, manages its own affairs, charges fees, and carries out any business or undertaking that seems proper to it.

To win international recognition, academic staff must be of international repute with a record of publishing internationally. In this vein, as MoE (1996: 98) asserts:

> The achievement of this necessitates the ability to recruit and retain good quality staff, to admit and stimulate good quality students, and to function in a supportive and enabling environment.

However, most of the universities are still developing and place heavy reliance on novice staff who are still finding their feet in the world of academia. In addition, the publication output of most universities in Zambia, both public and private, has remained very low over the years (Chipeta & Nyambe, 2012; Chanie, 2010). This can be attributed to a number of factors; among them the heavy workload of staff that reduces time spent on writing activities and lack of research funds which implies that staff have little research data on which to base their writing.

The paper agrees with Harvey and Green (1993), by arguing that quality assurance is important because the presence of lecturers in lecture rooms

does not automatically imply that proper and effective teaching is taking place. There is need, therefore, for internal procedures and mechanisms for evaluating the teaching and learning process in order to achieve excellence in teaching, research and publication. Before presenting and examining mentoring in teacher education in detail, let us examine and discuss the concepts relevant to our discussion and the meanings attached to them within the context of teacher education.

Defining Quality Assurance

In any discussion of quality, two twin concepts are unavoidable. One is that of *quality control* and the other, *quality assurance*. However, a definition of either quality control or quality assurance, must, as a matter of necessity, be precipitated by a definition of quality. Hornby (1989: 1187), defines quality as 'the practice of managing the way goods are produced or services are provided to make sure they are kept at a high standard.' Simply put, quality *is a degree of goodness*. Quality refers to the degree of fit between what a customer wants and what a customer gets. It entails doing the right things right.

As mentioned above, any discussion of quality inevitably relates to quality control. Quality control is 'the practice of checking goods as they are being produced, to make sure that they are of a high standard (Hornby, 1989; 1187). In a similar vein, Guri-Rosenblit (1997: 27), states that quality control procedures refer to:

> ...a set of operations that measure, and if necessary adjust, a product's appropriateness according to a set of predetermined required criteria... it is particularly complicated to define the exact standards against which it is possible to evaluate the fitness of an academic course for its purpose and how that fitness should be assessed.

On the other hand, *quality assurance* is the evaluation of quality. In other words, there must first be quality before quality assurance can be undertaken. And to explain this, various definitions have been cited in an attempt to provide diverse understanding of the concept of quality assurance. Guri-Rosenblit (1997: 27), has argued that 'quality assurance does not purport to clarify the standards or specifications against which to measure or control quality.' Further, Harvey and Green (1993: 19-20), have advanced that:

> Quality assurance is about ensuring that there are mechanisms, procedures and processes in place to ensure that the desired quality, however, defined and measured, is delivered. The assumption implicit in the development of quality assurance is that if mechanisms exist, quality can be assured.

At the Distance Education and Teacher Education in Africa Conference, held at the University of Nairobi in July 2013, some prominent scholars of teacher education made attempts to define quality assurance in teacher education. Notably, Kanwar (2013), defined quality assurance within the context of education as, 'The enhancement and preservation of quality in teaching.' In addition, Chakwera (2013), says quality assurance is about ensuring that there is quality according to defined standards or performance as expected; and that whatever activity is being carried out is relevant and conducted as planned. The point being made is that every institution has various mechanisms to assure quality. In most countries including Zambia, the responsibility for quality assurance rests within the educational institutions themselves (MoE 1996). Universities worldwide are expected to establish quality assurance mechanisms by which they can set performance indicators.

This resonates well with the similar example in Norway where in 1992, the law was changed to ensure that the responsibility of quality assurance was relocated from governmental control and placed under the control of educational institutions (Bo, 1997). This move assumed there had been weaknesses in the old system; however, the government had recognised the high levels of competence offered by private institutions offering distance education and took appropriate action. It was also a reflection of new ideas about how efforts to improve quality of could be organised (Bo, 1997). The new arrangement of resting quality improvement systems to institutions is the mode that Zambia has adopted with varying degrees of success.

So what is Mentoring?

Various definitions of the concept of mentoring exist but no single definition can suffice. Mentoring is a professional relationship between a mentor and mentee for the purpose of professional instruction and guidance. In providing a definition of mentoring, Ragins and Kram (2007: 5), have expressed their thoughts as follows:

> Although the definition of mentoring has been refined over the years, a core feature that defines mentoring relationships and distinguishes it from other types of personal relationships is that mentoring is a developmental relationship that is embedded within the career context. While learning, growth, and development may occur in many different types of work and close personal relationships, mentoring relationships are unique in that the primary focus of the relationship is on career development and growth.

In other words, mentoring describes a process by which a more experienced skilful or knowledgeable individual offers assistance to a less expert individual.

Theoretical Model

Although relational theories could equally be used to explain mentoring, my analytical framing for this article employs Kram's (1985) mentor role theory. Kram, the most widely cited author on mentoring, argues that mentoring is a type of developmental relationship in which mentors provide two types of functions:

(a) career functions, which focus on skill development of the protégé; these functions increase the likelihood of the protégé becoming successful, and include; sponsorship, exposure and visibility, coaching, protection, and challenging assignments; and

(b) psychosocial functions, which are centred on providing support and encouragement to the protégé. Psychosocial functions include; acceptance, counselling, friendship, and role modelling. These functions enhance an individual's 'sense of competence, identity, and effectiveness in a professional role' (Kram, 1985: 23).

Rationale for Mentoring of Novice Lecturers

The literature reviewed in this section focuses on the purpose and benefits of mentoring for novice lecturers. Since Kram's seminal work on mentoring, many others have been interested in the role of mentoring in educational systems in general and higher education in particular. The purpose of mentoring is multifaceted, and has far-reaching personal benefits for novice lecturers. Little wonder then, that many teacher education programmes around the globe place a high premium on novice lecturer mentoring. Such mentoring is particularly important in institutions like the University of Zambia where about one-third of lecturers in the School of Education, for example, are in the category of novice lecturers.

In what follows, a variety of data sources to advance the argument have been cited. Mentoring researchers have empirical evidence that supports the role of mentoring for career advancement. Substantial evidence from a wide variety of studies exists which demonstrate the efficacy of mentoring in work places (Lennox, Skinner and Foureur, 2008; Enerson, 2001; Powell, 1997; Simon and Wardlow, 1989). This point is emphasised by Lawson (1992), who contends that mentoring is a process that encourages self-efficacy and enables one to take on a new role successfully and become a fully committed professional. In short, mentoring is about support for new faculty. One way of supporting novice lecturers in being successful is through mentoring. Through systematic mentoring, universities and other tertiary institutions of learning can help facilitate novice lecturers' quick transition to teaching. These arguments are attempts to advance the conviction that what novice lecturers

learn during mentoring is crucial in helping them adapt as quickly as possible to the various demands of their new jobs.

As more and more inexperienced, but highly qualified young people continue to penetrate into every sector of academic life in Zambia, the need to help these upcoming scholars has been recognised and has created a fertile ground for the initiation, and development of mentoring of novice lecturers in teacher education.

A study by Banja, Ndhlovu and Mulendema (2011), on the perceptions of university lecturers towards mentoring of novice lecturers pointed to the fact that under ideal circumstances, the process of mentoring is beneficial to novices in ways that include confidence to teach effectively, improved collegiality with senior staff (novice lecturers also benefit from an ongoing relationship with an experienced faculty member as they develop their teaching and service expertise), easy adaptation to their job, acquisition of skills on time management and goal-setting, and understanding their job descriptions. This agrees with the findings of other researchers on the subject such as Kram and Ragins (2007: 668) who have argued that:

> There is now a collective view that outcomes related to personal learning, development, and growth are equally relevant and important.... These new outcomes include factors such as personal and task learning, organisational socialisation, relational competencies, adult development, personal growth, physiological outcomes and other factors related to the non-work domain.

The benefits of mentoring are identified in a simpler but more clearer way by Godshalk and Sosik (2007: 171), who have contended that:

> Mentoring relationship also provide substantial benefits to mentors, protégés and organisations. Mentors may gain prestige, a sense of generativity, and internal satisfaction. Protégés may build social networks, develop and learn new career-related skills, and gain promotions, pay raises, and job and career satisfaction.

Further, William and Blackburn (1998), studied faculty mentoring in eight nursing colleges and found that, mentoring types of role specific teaching, and encouragement were related to protégés research productivity.

From the aforesaid, it is not far-fetched to infer that novice lecturers need expert guidance from experienced lecturers to be able to perform their roles successfully. Hence, mentoring is very crucial during the early years of novice lecturers' life for them to be able to develop both personally and professionally as fully fledged academicians. Mentoring becomes a huge asset in helping to adequately prepare novice lecturers for the demands of academic life.

Mentoring of novice lecturers as reviewed in the literature, will take place in an ideal environment. However, it must be acknowledged that the mentoring process can sometimes be messy. Even though the literature has demonstrated beyond doubt that mentoring relationships are beneficial for novice lecturers, studies on mentoring have simultaneously shown that many mentoring programmes have their own problems that are worth discussing. To start with, mentoring does not answer all problems of novice lecturers. Mentoring outcomes are affected by different aspects. These include; gender, characteristics of the mentor, and characteristics of the protégé amongst others (McKeen and Bujaki, 2007). In assessing the difficulties which are inherent in determining outcomes of mentoring, Kram and Ragins (2007: 668) have argued that:

> As we progress in our understanding of variations in the quality and processes of developmental relationships, we have also begun to acknowledge that these outcomes may be more difficult to measure yet are critical for understanding the full impact of mentoring on individuals, relationships, and organisations.

Literature on the subject of the role of the mentor takes cognisance of the fact that mentoring does not exist in a vacuum, and is depended upon and affected by a myriad of factors. Mentoring needs to be contextualised, taking into account other relationships, within and outside institutions.

Eby and McManus (2004), examined the specific types of dysfunctional experiences that mentors report in mentoring relationships. The themes identified include negative relations involving exploitation and egocentricity, malevolent deceptions, sabotage, harassment, interpersonal difficulty, spoiling, benign deception, submissiveness, performance below expectations, and unwillingness to learn.

In addition, there is extra demand on any senior in terms of their time. Mentoring increases the workload for both the mentor and the mentee, and might require freeing some people, both mentors and mentees of teaching time.

According to Nikandrou, Panayotopoulou and Apospori (2008), there are many determinants of career advancement. These include individual, interpersonal, organisational, human capital and family determinants. Individual determinants include personality traits and other psychological factors that concern one's capacity for managing, for example, motivation, career aspiration and gender role orientation. Kram (1985) and Allen (2007), say studies have found that rigid organisational structures, unclear expectations, job pressures, and a competitive environment impede the mentor's ability

to mentor others. However, interpersonal determinants which involve supportive relationships at work, such as; mentors and peer network facilitate advancement of the novice employee.

Powell (1997), suggests that a successful mentoring programme results from significant commitment and ownership by all stakeholders, namely; the employing organisation, mentors and protégés. Regarding the mentoring relationship, Kram (1985), alludes to the need for mentees to be receptive to the programme and make it their priority to learn what the mentor has to offer. This requires the novice to respect and be grateful to the mentor and emulate him/her. The goal is for the mentee to identify with and imitate the mentor, receive reinforcement for positive behaviours and attitudes, learn how negative and inappropriate behaviours may interfere with emotional growth, and develop educational and work goals.

Powell (1997), argues that mentoring is one component which is integrated into a broader individualised development effort. The degree to which mentoring is integrated with other interventions affects its potential for success. It would, therefore, be naïve and erroneous to assume that one can only succeed as a novice lecturer if they were mentored by someone. As Dougherty and Dreher (2007), state, not all mentoring functions are provided by mentors. The danger lies in overemphasising the role of mentoring to the exclusion of other equally important aspects of ensuring competence in newly qualified teachers.

Among the first steps in developing and sustaining relationships between the mentor and the mentee, and ensure that mentoring becomes an effective quality assurance tool, is the need to institutionalise mentoring of novice lecturers in teacher education programmes. Key to this process is an institutional policy that facilitates institutional commitment to mentoring. However, structured mentoring programmes around the world are not common (Clutterbuck, 2007) because of numerous reasons some of which are discussed in the section to do with challenges facing novice lecturers.

That said, creating a framework for introducing mentoring is not sufficient on its own. What is needed is to translate the policy into an implementation strategy. Such a policy orientation would provide the enabling environment in which all aspects vital to successful mentoring would be catered for. These include guidelines of rules and procedures and the roles and functions of all stakeholders.

Challenges Facing Novice Lecturers

Let me now cast this discussion in the context of some of the challenges facing novice lecturers. The literature on mentoring in teacher education also contains a great deal of information about the challenges novice lecturers face in the execution of their duties. Banja *et al*. (2011), established that despite their

potential and actual contribution to institutional and national development, the role of novice lecturers has been constrained by a number of factors particularly in areas critical to their success as upcoming academicians. This notwithstanding the fact that many novice lecturers are not prepared to face the scenarios they encounter as lecturers during the early years of their working life. Novice lecturers lamented about the lack of a systematic approach for identifying novice lecturers who needed help in their professional life. The most difficult problem that novice lecturers encountered in their duties was the lack of pedagogical skills.

Some novice lecturers in Banja's *et al.,* study (2011), further reported that they experienced challenges in a number of areas including; conducting research, designing appropriate curricula, development of course materials, academic paper publications, conference paper presentations skills, evaluation of students' work and counselling students. Other challenges related to understanding professional ethics and effective pedagogy. As a result, novice lecturers continue to encounter the challenges discussed above.

Clutterbuck (2007), acknowledges that literature recognises that mentees have needs though there has been little focus on the specific and individual requirements of mentees. The lack of mentoring for novice lecturers can constitute a severe barrier to the formation of positive self-concept and self-image. This agrees with Centra (1978), who reports that faculty members in their first or second year of teaching, encounter a lot of difficulty to teach effectively. And, yet, critical to the whole concept of quality assurance in teacher education is that of the ability to teach. New staff require more than specialised knowledge in a discipline. It is not sufficient for the faculty to know only the content of their fields.

Lankau and Scandura (2007: 95) have argued that:

> Learning from training programmes and books will not be sufficient to keep pace with required competencies for success in today's fast-paced work environment. Individuals often must look to others to learn new skills and keep up with the demands of their jobs and professions. Mentoring relationships can serve as a forum for such personal learning in organisations.

Organisations being referred to by Lankau and Scandura above include universities and other tertiary learning institutions. It is not adequate to simply introduce novice lecturers to their new work stations; the goal should be to develop lecturers that are effective in all their roles as teacher educators. Therefore, the ability to teach must take the centre stage. This is critical given the current scenario in most universities where 'aspiring for excellence in research is a common goal of all universities, but excellence in teaching is rarely rewarded' (Guri-Rosenblit, 1997: 26).

What is of particular interest to this discussion is that many novice lecturers possess little in terms of teaching experience, having been drafted as staff development fellows upon completion of their undergraduate studies. However, individual lecturers retain a high degree of control over every aspect of their work. The very same idea is expressed by Guri Rosenblit (1997:30-31) as follows:

> The concept of academic autonomy assumes that what goes on in a particular classroom is the sole responsibility of the professional scholar concerned, which rests on a view of the academic 'as professionally competent over the full range of activities he/she undertakes, and this competence includes the necessary knowledge and skills to make or seek insightful and valid appraisals of his work and act on these appraisals.

In short, these factors militate against novice lecturers attaining levels of competence, efficiency and effectiveness that is expected of them. So, the questions at stake are, how well-equipped are novice lecturers to teach, do research and publish? To what extent can mentoring help to develop the required competencies of novice lecturers? It is hypothesised that through systematic mentoring, competencies of novice lecturers in teaching, research and publications could be improved.

Despite the perceived challenges, mentoring can help address disparities in experiences and qualifications, beliefs and perceptions between novice and senior academic staff, and subsequently, help boost the aspirations and self-worth of novice lecturers. This being the case, the author argues that one other process in the quality assurance system that has been neglected is the mentoring of novice lecturers.

Suggested Strategies for Implementing Mentoring

In order to operationalise the institutionalisation of mentoring, a multi-faceted approach is imperative. First, there is need to build capacity among potential mentors by training senior academic staff in matters of mentoring. The belief that a senior academician demonstrates mentoring ability by virtue of their qualifications and experience is often taken for granted as a truism. Not all senior lecturers are sufficiently knowledgeable about issues of mentoring to offer appropriate help to novice lecturers. The varying levels of appreciation of novice lecturer mentoring and the shortage of trained and experienced mentors among the cadre of senior academic members, is a major challenge. Whatever policy and strategy for staff training are adopted, there is need to:

> define and agree within the organisation the general and particular needs for training, based on a systematic needs analysis... select appropriate training events and interventions, construct a coherent training plan in the light of available resources, communicate to all concerned and build a supportive climate for training... *(Commonwealth of Learning,* 1997: 27)

The role and place of mentoring in teacher education, can best be explained by developing a generally accepted understanding of mentoring as a distinct field of study in its own right. Therefore, those who undertake to mentor others must first be equipped with the requisite knowledge and skills to do so, to avoid displaying little basis for understanding the nature and goals of mentoring and consequently, not lend their time and energy to this important activity.

Further, the policy must provide for a sustainable structure to ensure continuity and positive impact. But, this can only be made possible if both academic and administrative managers offer support and get actively involved in mentoring activities as an integral part of an academic culture. Such commitment and involvement from senior academic and administrators and management, is crucial to the successful implementation of mentoring. It is through such support that education, training and other forms of assistance can be offered to employees.

In addition, mentoring must be integrated as part of departmental work and those providing mentoring must be rewarded for their efforts and achievements. Rather than leave it to individual goodwill, the provision of mentoring should be formally made one of the responsibilities of senior lecturers with accompanying incentives such as, making it as a promotion requirement for those applying to move from one level to another; payment of allowances could be another incentive. If and when institutions put such a premium on mentoring, senior academic staff would more likely be persuaded to provide this experience for their new staff. Some universities in Africa such as the University of Nairobi (Rambo, Personal Communication, Thursday, 01/08/2013), and the University of Botswana, have already effected some of these incentives (Kanduza, 2012). Whether they work or not, only time would tell.

At the University of Zambia, there is no specific mentoring programme for young lecturers; even though the need for such mentoring of novice lecturers has since been recognised by the university authorities, and has been included in the *2013-2017 Strategic Plan University of Zambia* (2012). However, this Strategic Plan does not spell out in sufficient detail a policy that is effective

and anchored on a solid framework for promoting and supporting the development, implementation and sustainability of novice lecturer mentoring. The need for such a policy which would create a conducive environment for mentoring cannot be overemphasised.

In addition, to build the culture of mentoring that is being envisaged, there is absolute need to reduce the heavy workloads among senior academic staff which makes it difficult even for the most enthusiastic lecturer to respond adequately, effectively and efficiently to the increasing needs of diverse novice lecturers whose numbers keep rising. In Zambia, most public tertiary institutions are understaffed because of stringent recruitment procedures and exodus of highly qualified local staff who leave in search of greener pastures. Lecturer attrition has resulted in a significant decline in staff numbers (MoE, 1996). The senior staff have multiple demands on their time, and, as a result, they are overloaded leaving them with little time for mentoring activities. The severity of the situation described above is captured vividly in the following account by the Ministry of Education (1996: 99):

> Between 1984 and 1994, the University of Zambia alone lost over 230 of its lecturers, 161 of them being PhD holders with a considerable degree of seniority. The loss to the institution, in terms of replacement needs, disrupted programmes, and demoralisation of ongoing staff, is incalculable. The loss of so many members of academic staff puts quality teaching of students at risk, since the services of the remaining staff must be dispersed over ever larger student numbers.

It also leads to the reliance on a small albeit junior academic staff including staff development fellows, to handle most of the tutoring and teaching responsibilities. As things stand presently, most universities in Zambia are not sufficiently well equipped for this responsibility.

With highly demanding job descriptions, it is hardly possible to allocate sufficient time to the mentoring relationship and help monitor the quality of teaching and learning.

Another implementation strategy is to institute deliberate steps which must be taken to encourage, support and enhance collaboration between senior and novice academic staff in such areas as authorship and presentation of academic papers at local and international fora; in conducting research and consultancy and other areas of academic pursuit. This will undoubtedly accord novice lecturers the opportunity to learn from their senior colleagues,

notwithstanding the fact that the success of such a mentoring relationship depends in part on the expertise, experience, and/ or position of the mentors in the organisation.

While these suggested strategies may be common and not new in Western literature and practice, in most of Africa where mentoring is largely a new concept, these strategies are novel and, therefore, worthy of trying out.

Conclusion

The main task of this article was to present novice lecturer mentoring as a viable alternative in assuring quality within teacher education. This paper has argued that tertiary institutions should include a formal system for mentoring novice lecturers in all aspects of professional development. The calibre of teaching staff, amongst others, is important in determining the quality of those who emerge from higher level institutions MoE (1996). Without mentoring of novice lecturers, the quest for excellence remains illusionary and jeopardises the mission and responsibility of these institutions to offer high quality education and knowledge to their clients. If well done, however, mentoring can be a critical quality assurance tool with huge benefits for novice staff.

In addition, the role of novice lecturer mentoring should be seen in the wider context of the mandate of the university. Mentoring of novice lecturers can contribute to the fulfilment of institutional achievements. Improving novice lecturer effectiveness contributes to the achievement of the school goals and to overall institutional organisation.

Quality, quality control, quality assurance and mentoring of novice lecturers will continue to be discussed in teacher education. This article makes it explicit that if we are to talk about quality assurance in teacher education, a discussion of mentoring must be part of that discussion.

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CHAPTER 6

Supporting Induction to the Teaching Profession for Women in Malawi

Freda Wolfenden

Abstract

Gender parity in primary and secondary education has yet to be achieved in many countries in sub-Saharan Africa, including Malawi. The presence of female teachers is recognised as positively impacting on girls' enrolment and learning success, but in many rural areas in Malawi, there are few qualified female teachers working in primary or secondary schools.

This paper contributes to the current debates on how to address this gap in qualified female teacher recruitment and retention in rural areas. One suggested solution to breaking the cycle of low female achievement in rural areas is the use of distance education to prepare local women to become teachers in their own communities. In the programme reported on in this paper, aspiring female teachers are supported to take on the role of 'learning assistants' in their local community primary schools while studying to achieve the qualifications necessary for application to a formal primary teacher training course.

Using applications, interviews and workshop data from the early stages of the programme, the backgrounds and motivations of applicants to the programme are explored. The paper also discusses the implications for the design of this distance learning programme, emerging constraints on the achievement of programme intentions and areas for further study.

Keywords: Learning assistants, Malawi, women, rural schools, teachers, distance learning

Introduction

A common factor in countries that have achieved the universal primary education (UPE) and gender parity goals, is a substantial increase in the number of female primary school teachers (Commonwealth Secretariat & UNESCO, 2011). The training and deployment of female teachers has contributed to meeting capacity. Equally important, female teachers have influenced conditions in schools and classrooms in such a way that their presence correlates with increased retention and learning gains of girls, particularly in rural areas where the challenges of girls' education are greatest (Herz & Sperling, 2004; United Nations Girls' Education Initiative, 2008; UNESCO, 2000).

Female teachers can challenge and change school culture and pedagogy in ways that offer girls greater encouragement towards success and achievement. They are able to advocate for girl pupils and to offer role models different to those habitually offered to girls in rural areas. In a Malawian study, both parents and teachers expressed the view that female teachers also play a role in upholding moral standards and "offer personal counselling to girls" (Commonwealth Secretariat & UNESCO, 2011:18). The absence of female teachers, combined with a lack of gender-sensitive approaches in schools is argued to contribute to the perpetuation of female under-participation and achievement (Gaynor, 1997).

However, strategies for the recruitment of female teachers, particularly in rural areas, are problematic. Firstly, the number of girls who successfully complete secondary education is frequently small. This limits the pool of potential recruits to the teaching profession, particularly when countries are concerned with ensuring quality in teacher recruitment. Secondly, in many countries there is often little interest in becoming a teacher among older girls in senior secondary schools. Teaching is regarded as a low-status profession to those who have opportunities to access other professions and occupations (Casely-Hayford, 2008).

Qualified female teachers are frequently extremely reluctant to work in rural areas for extended periods. Overt encouragement for women to enter the teaching profession (feminisation of the profession) gives rise to concerns that this will be associated with a loss of status for the profession and lower earnings (Drudy, 2008). These are complex issues that demand greater attention to the gender realities of rural women when designing and implementing teacher education programmes such as the new distance learning initiative, which aims at supporting women who are entering the teaching profession in Malawi described here.

The Malawi Context

In rural Malawi, the shortage of qualified female primary teachers is acknowledged to be a major factor that hinders progress towards the Education for All (EFA) goals. Primary pupil enrolment increased dramatically following the introduction of free primary education in 1994, but it is unlikely that Malawi will achieve universal primary education or gender equality in education by 2015 (UNESCO, 2011). As in many other countries in sub-Saharan Africa, the gap between goals and the current situation is greatest in rural areas, home to 80 per cent of the population. Here, primary school drop-out rates are high and pupils at all levels perform poorer than those in urban areas (Malawi Institute of Education, 2009). This disadvantage is compounded for girls. Fewer rural girls than boys complete primary school and those girls who do reach grade 10 are less likely to pass the Primary School Leaving Certificate Examination (PSLCE) than their male peers (Republic of Malawi, 2007). At junior secondary level, the pass rate for boys is almost 20 per cent higher than that of girls (Malawi National Examination Board, 2010).

Across the country, females comprise just over one third (38%) of the current primary teacher workforce (Republic of Malawi, 2008), but these average figures mask considerable geographical differences. In 2008, Lilongwe City had 2,011 trained female teachers and 298 trained male teachers, while Nsanje district's qualified primary teacher workforce comprised of 93 females and 485 males. Even in a rural area like Nsanje, female teachers are more likely to be located at a peri-urban area or growth point. Thus, girls in rural schools frequently have no experience of female teachers as role models. Gender discrimination and exclusion of girls can be unchallenged, with gender disparities remaining deeply ingrained (UNESCO, 2010a; UNGEI, 2008).

The reasons for this gender distribution of teachers in Malawi are complex. In comparison to many other countries in the region, female recruitment to the profession is relatively low (World Bank, 2010). Despite efforts to address the gender imbalance, the percentage of females recruited to the standard Initial Primary Teacher Education programme (IPTE) has only been above 50 per cent in one of the last four years for which there is data (details in Table 1). This is not surprising, as expectations of academic success in Malawi are generally lower for females. This is more pronounced in rural areas (Kamwendo, 2010). In addition, the drop-out and turnover rates of female teachers in rural areas are high (Kruijer, 2010). Many female teachers are reluctant to be deployed to rural areas or request transfers away from rural areas after only a short time. Female teachers tend to prefer living in the cities. They perceive that there are more opportunities for development and career progression in the cities, housing is poor in rural areas (there is little official housing and a lack of other suitable housing) and are often without basic services (running water and

electricity). Most crucially, dominant gender expectations act against teaching in a rural area. For unmarried women, it is often felt to be unsafe to live alone in rural areas and for married women, their husbands' employment often precludes deployment to rural areas (Kadzamira, 2006).

In Malawi, most primary teachers enter the profession through one of two routes. Primary teacher training colleges run a traditional campus based on the IPTE programme with an average combined annual output of 4 000 new primary teachers. In 2010, recognising that the demand for primary teachers would never be met with the capacity of the IPTE programme, the government implemented a new open distance learning (ODL) programme for teacher training in rural areas (Republic of Malawi, 2008). This two-and–a-half-year programme is scheduled to run for three cohorts, each of approximately 4 000 trainees. After an initial four-week induction, trainees spend almost all their time in schools and are paid 90 per cent of a qualified teacher's salary. The programme follows the same curriculum as the IPTE, but with the material adapted for distance learning.

To encourage teachers to remain in rural areas, trainees on this programme must commit to remaining in their placement school (selected by local officials) for five years following qualification. Applicants to both programmes are required to have successfully obtained a full Malawi School Certificate of Education (MSCE), usually taken at the end of four years of secondary schooling. For the ODL programme, the requirement for MSCE credit in English has been removed. (It is too early to assess the impact of the ODL programme on the number of qualified female teachers in rural areas.)

Many previous initiatives in the region have focused on attracting greater numbers of female applicants to teaching and then persuading them to work in rural areas. Tactics include changing the attitudes of newly trained teachers, integrating inexperienced teachers into community life and improving living and working conditions (Casely-Hayford, 2008). Such approaches may improve gender parity in pupil access and outcomes, but they do not offer sustainable solutions to female empowerment through education in these communities. These measures generally favour women from more urban areas who have little interest in long-term teaching in rural areas. It is suggested that there is a need to rather consider how the education of women in these communities can be reshaped to support the development of their capabilities, including becoming teachers. These women are familiar with the context of their communities and can act as symbols of female agency, challenging the expectations of female life opportunities, which are currently largely limited to domestic or farm work.

The pilot programme reported here (MATSS) adopts such an approach because it utilises distance learning to support females in rural areas to gain the

qualifications and confidence to become teachers in their own communities. This disrupts the cycle of rural female underachievement. The programme is congruent with government policies to increase female enrolment in teacher training and the overall number of teachers (Republic of Malawi, 2008). MATSS was designed by the Open University (OU), UK, in partnership with Forum for African Women Educationalists in Malawi (FAWEMA) and builds on the extensive experience of TESSAi (led by the Open University, UK) in developing resources and programmes for student teachers in sub-Saharan Africa.

MATSS Programme Structure

The Malawi Access to Teaching Saltire Scholarship (MATSS) 1 programme aims at increasing the number of qualified female primary school teachers in rural Malawi through targeting and supporting women in rural communities to apply for formal teacher training (IPTE or ODL). It combines distance learning study and practical school experience to provide a pathway to a teaching career for women who may be marginalised from formal learning, not only by being female and rural, but also by their ages and life circumstances. In its initial stages, the programme recruited two cohorts of 500 women each over two years (2011 and 2012) across four districts. These women aspire to be primary school teachers, they have previously studied for the MSCE but failed to achieve the requisite number of subject passes for the certificate (MSCE) and are consequently, ineligible to apply for a formal teacher training place.

During their year on the programme, the women are known as scholars. They spend four days each week in a local primary school working alongside a teacher in a Standard 1 or 2 class while also studying for their MSCE in the priority subjects of Mathematics, Physical Science, Biology and English. Distance learning materials have been developed to support both MSCE study and the structured school placement in the form of a school experience handbook. During MSCE study, scholars are supported by a local tutor. At the primary school, each scholar is allocated a mentor who is encouraged to act as a "critical friend", meeting regularly with the scholar to discuss her experiences in the school, to identify ways of helping her if she is encountering difficulties and to verify the completion of activities in the school experience handbook.

This school experience dimension acts to induct scholars into the teaching profession as para-professionals and aims to serve two functions. Firstly, scholars are positioned to support pupil learning and as female role models for girl pupils. Secondly, through this experience, scholars find out if their commitment to teaching persists when exposed to the realities of classroom life.

Previous studies have concluded that many trainee teachers in sub-Saharan African contexts can feel poorly prepared by their college courses for the demanding realities of classroom life. Akyeampong and Lewin (2002:344) suggest that many beginner teachers experience a "reality shock" when they first start as qualified teachers. The period of structured classroom work offered by this programme aims to offer some preparation for this reality, better equipping potential trainees for the future discussion of classroom life (Akyeampong & Stephens, 2002).

Scholars receive a modest bursary to cover travel expenses and personal hygiene and presentation. Towards the end of the year, there is guidance on applying for the IPTE and/or ODL teacher training programmes. The programme is guided by a Steering Group, which includes key stakeholders from the Malawi government (Head of Basic Education, Head of Department for Teacher Education and Development) with development partners including the Department for International Development (DfID) and the Canadian International Development Agency (CIDA). All programme material was created and critically read by local teachers and teacher trainers, and developmental testing was carried out with female students and teachers in Malawi. Material includes open educational resources, available on the TESSA website under a Creative Commons, Share Alike licence, allowing users to use, reproduce and integrate with other resources without copyright costs.

Programme Implementation

To develop the programme framework, the research drew on experience with distance learning programmes (Moon, Leach & Stevens, 2005) and similar projects with learners in the Malawi context (Chakwera, 2009; Pridmore & Jere, 2011), including the complementary basic education (CBE) programme.[III]

The distance learning material (MSCE and school experience handbooks) is informed by situated learning theory in which skills and knowledge are acquired through authentic contexts and by communicating with peers and experts (Lave & Wenger, 1991). Frequent, practical activities are complemented with reflective writing tasks and prompts for discussion with peers and more experienced mentors and tutors. Activities, particularly those in the school experience handbook, encourage scholars to engage in ongoing conversations with their practice and that of the teachers they are working alongside. In each school, the head teacher nominates a mentor (an experienced teacher) to work with the scholars. Mentors support scholars in negotiating the initial stages of the intricate process of becoming a paraprofessional, extending support beyond classroom practices to include a discussion of the whole school and

community concerns (McIntyre, Hagger & Wilkin, 1993; Mtika & Gates, 2011). Through workshops and guidance material, mentors are encouraged to guide scholars in developing organisational skills, appropriate behaviour and negotiating the boundary between being learners and para-professionals. Wenger (1998), suggests that the experiences of mentors can serve as "paradigmatic trajectories". They provide details of how the school and teaching actually work and set possibilities for the scholars. Guidelines for the selection of the mentor strongly suggested that she should be a qualified female teacher, who offers a socially secure relationship in which the scholar can learn and grow as an emerging professional. This has not always been possible and a small percentage of mentors are qualified male teachers. Other teachers and the head teacher are potential additional sources of professional and practical support. Teachers' families looking after scholars' children were observed and a few head teachers have allowed very young babies to accompany scholars to school.

To support MSCE distance study, scholars are allocated one tutor for Mathematics/Science and another for English. These are usually local secondary school teachers with experience of teaching MSCE. Tutorial groups meet every week at the local Teacher Development Centre (TDC) or secondary school to discuss progress, and on alternate weeks, the tutor is present to structure and lead the session. The researchers wanted to recruit female tutors, but the gender imbalance among secondary school teachers is particularly acute in rural areas. As a consequence, only two (out of 40) MSCE tutors in the first year of the programme are women. The MSCE materials follow the specified MSCE curriculum drawn up by the Malawi National Examination Board.

Scholars are always placed in pairs (and often in groups of four to five) at primary schools where there is already at least one female teacher. This both facilitates peer support and attempts to reduce the possibility of gender violence (Leach et al, 2002); scholars lack the authority of teachers and could be open to prejudice and abuse from male teachers or older male pupils.

Participation in the programme is a process that embraces evolving competence in the tools and practices of teaching. Curriculum subjects are understood as sets of social practices undertaken by members of a community, and there is a conscious attempt to highlight scholars' relationships between their own developing subject knowledge (MSCE) and their school practices with young pupils. Scholars are positioned with potential multiple sources of support (both formal and informal) through a network of people in the primary school, community and secondary school or TDC. A representation of this is shown in Figure 1.

The programme launched in two districts in the south region, Mwanza and Chikhwawa, as well as the Dedza and Ntchisi districts in the central region (Malawi has 34 educational districts organised in six divisions).

Multiple data sets were analysed to select these districts. These included the number of qualified female teachers, the pupil-to-teacher ratio for trained teachers, the MSCE pass rates of females, the drop-out rates of females in primary education, and adult female literacy (Republic of Malawi, 2009). The district education priorities were considered (UNICEF, 2009) and logistical issues were factored in.

Communication and transport networks across Malawi are not properly developed outside the main centres of population. In addition, the activities of other non-governmental organisations (NGOs) and projects were reviewed to identify possible synergies, partnerships and discussions held with ministry officials before a final selection was made. These four rural districts have low scores in all the Education Management Information System (EMIS) data points considered, and resident officials expressed interest in supporting the programme. Prior to launch, an extensive series of "sensitisation" activities were held in each zone (local area) in conjunction with the local District Education Office. Such activities served to raise awareness of the purpose of the programme and attempted to confer "legitimacy" with local leaders.

The recruitment of scholars is administered by FAWEMA, with support from other NGOs operating locally. Interest in the project exceeded expectations with several thousand women attending information sessions and 1 700 submitting applications. Selection was done against a number of transparent criteria, which included residency in the zone, prior completion of secondary schooling (MSCE), achievement in English at MSCE level and commitment to becoming a teacher.

At the start of the programme, scholars attend a local two-day residential induction meeting facilitated by teacher training lecturers, local and national education officers and gender experts from FAWEMA and other NGOs. These sessions familiarise scholars with the material and programme methodology, and enable them to meet each other, mentors and tutors. Induction leaders emphasise the benefits of peer support and other support mechanisms (*Figure 1*), as well as the importance of scholars taking responsibility for their own learning, progress and success in the programme.

Methodology

A longitudinal study placing the scholars at the centre of the enquiry, exploring their experiences of the programme relative to their own development and changing identities, is integrated with the programme. This includes the exploration of resources the women bring to the programme, how these are recognised, utilised and legitimised and how the learning opportunities of the programme are experienced and they lead to changes in the scholars. Including the perspective of tutors and mentors is also important. Data collection is at

fixed points during programme delivery. Some of the data is used for reporting to funders and programme evaluation. The findings presented here are from the early stages of the project. They draw on an analysis of the applications of 500 scholars in cohort one, together with semi-structured interviews with a small sample (12) of scholars from two districts (Mwanza and Chikhwara) and with mentors (four) and tutors (four) in two districts (Dedza and Ntchisi). Logistical and resource issues limited the number of such interviews that could be carried out in these early stages.

The programme selection process had multiple stages. The initial application form required a description of applicants' previous school experience, MSCE results and interest in the programme. Applicants were then invited to attend a recruitment centre to undertake an extended written task in English (one hour). The following items were included in the task:

- Describe a situation in your life where you overcame something difficult.
- What was your strongest subject at MSCE level? Why was this?
- What are the qualities of a good teacher?
- Why are female teachers important?

An oral interview was also conducted in English with female interviewers (FAWEMA and a local NGO) for approximately ten minutes. The interview verified the applicant's identity and involved an unstructured discussion on one topic (from a list) linked to educational experiences and aspirations. Approximately 1 000 applicants went through this process.

The selection process posed several challenges. These included transport, practical issues associated with verifying applicants' residency and prior qualifications, as well as difficulties in the recording and categorisation of applicants' interview responses. It became apparent that interviewers had little experience of note-taking during the interviews and the resulting summaries (in a pre-supplied template) offered little differentiation between applicants. Consequently, a large number of candidates scored full marks on all criteria. Due to their limited reliability and validity, only limited use was made of these interview notes in applicant selection and the research. For the next cohort, aspects of the application process are being refined, but it is perhaps worth noting that this selection process was perceived as innovative for its inclusion of open-ended questions linked to motivation and prior experiences.

Twelve semi-structured scholar interviews were carried out at induction sessions by members of the UK project team. This may have influenced the way that the participants expressed themselves. Interviews were carried out in English and many interviewees struggled to find appropriate words. Furthermore, their responses are highly likely to have been conditioned by the involvement of "outsiders" of the project. Interviewees were selected

against prior levels of MSCE achievement and age. Interviews generated detail on the scholars' rationale for participation in the programme and their prior education and life experiences, including the challenges of completing the MSCE. In addition, they provided insights into scholars' views about the behaviour and attributes of a "good teacher" and how these were informed by their beliefs about teaching and learning. Mentor and tutor interviews were undertaken at schools visited by the project team in the first three months after the project launch. Schools were sampled based on the number of scholars, pupil roll and location, but the project team had little knowledge of the mentors or tutors prior to the visits. Interviews were audio-recorded and full transcripts of the interviews were produced later.

An initial analysis of the qualitative data (applications and interview transcripts) involved critically examining a random sample of individual responses to the four open-ended questions to develop categories. This was undertaken separately by three members of the UK project team, who then agreed on a coding frame to apply to the entire sample of 500 successful applicants. The same frame was used for the scholar interview data to enable them to describe and analyse the data sets within a common conceptual framework.

Findings: characteristics of the scholars

Age: No age limits were placed on applicants to this programme, as older women with family ties may be more likely to stay in their own communities rather than leaving to pursue opportunities in urban areas. Successful applicants covered a wide age range, with several individuals being over 35 years of age and a few under 20 years of age. The majority of scholars are aged between 20 and 30 years (detailed information is given in Table 2).

There is little data for comparison. Coultas and Lewin (2002), found the average age of female trainees in Malawi to be similar (25.9 years), but their cohort mainly consisted of untrained teachers already working in schools who were subsequently undergoing upgrading. The scholars of the current project span a wider age range, but it is not possible to know whether this is due to the nature of the programme or its application process, which paid greater attention to potential and motivation than typical Malawian teacher training programmes.

Educational qualifications: All scholars were required to show evidence of previous MSCE study. The majority of scholars had attempted the MSCE examinations in the last five years (Figure 2). However, there were some scholars who had first attempted the MSCE examination as long ago as 1984. A minority (54 scholars from the cohort of 500) had attempted the MSCE

examinations on more than one occasion. As could be expected, these were almost entirely older scholars (aged over 30).

To obtain a full MSCE certificate requires five or six passes at MSCE (depending on the number of credits), including passes in key subjects – Mathematics, one science subject and English. Although the average number of passes for scholars is close to six (Table 3), they lack passes in the key subjects (Table 4). The high number of passes in English is a reflection of the selection criteria for the programme; fluency in written English was given primacy as a selection criteria. The MSCE examinations, the project material and teacher training are all through the medium of English and it was argued that proficiency in English would give applicants the greatest chance of success.

An analysis of areas of poor prior attainment (Table 4) in the MSCE data reveals that Mathematics is particularly problematic, and this is reflected in scholars' comments. Over 80% identified this as their weakest subject in school. A lack of books and equipment, poor teaching, including a lack of encouragement from the teacher, and teachers without relevant qualifications were all cited as contributing factors to low accomplishment in Mathematics. Many expressed low self-esteem in Mathematics and Science and constructed themselves as low achievers. Nevertheless, the fact that they reached the final years of secondary school positions these females as high achievers in their own communities.

Family experiences of education can be highly influential in a trainee's choice of teaching as a career, and other researchers have thus explored the educational attainments of trainees' parents (Coultas and Lewin, 2002). This was not an explicit line of investigation in the current study, but scholars' mothers' experiences emerged as a theme in scholars' backgrounds. Many described their mothers struggling to care for several children without partner support, mothers suffering abuse from partners and other family members, illness and low levels of maternal qualifications. A minority drew directly on this experience to rationalise their interest in the programme and their determination to be economically active and independent.

> "My father died in 1991 and we have raised in a difficult life because my mother dropout from school in standard 2, so had no chance to get employed and she did not know how to run a business." (sic) (C052) 4.

All applicants had left school at least a year previously, so their activities and employment prior to the programme were scrutinised. The researchers were interested in perceived potential return to the individual while in their current occupation or employment. The extent of this perceived return was linked to a view of teacher training as a stepping stone to teaching or to

employment in other potentially more lucrative sectors. Data on the previous occupation of the scholars is fragmented with more than half of the cohort responding "none" or failing to answer this question. Interview data leads the researchers to suggest that many of the women who did not respond are involved in farming, house-work and domestic labour. There were small differences across the districts; for example, in Ntchisi district there were no scholars already engaged in education-related work and over 90% of those who responded described themselves as farmers or working in the home. However, in Mwanza district, 12 scholars were already engaged in education-related work. This included "nursery teacher'' and "volunteer teacher".

It is difficult to draw conclusions from this data beyond noting that few of the scholars have had any employment in the regular waged sector, and that the majority was engaged in farming and/or domestic work before starting with the programme. For these failed MSCE candidates, there are scarce opportunities for further training or education and limited openings for formal employment in rural areas.

Motivation for teacher training: The majority of scholars expressed extrinsic motives for joining the programme. These motives were focused around meeting materialistic needs, a wish to be financially independent and to be able to support dependants.

> "I think it's better to work so that I should assist my family, my relatives." (Respondent C15)

Many mentioned the desire to contribute to their local community or country by supporting children's learning and reducing the pupil-to-teacher ratio:

> "So it is my ambition to help the villagers and village head men to help all the children who don't like to go to school… we want to empower all the children surrounding us." (Respondent MO25)

Approximately a third of the responses included a gender dimension. These individuals wanted to act as a role model for girls in their local community:

> "Assist girls to work hard at schools in order to go to university, not only boys." (Respondent M133)

> "They can give courage to the ladies." (Respondent M138)

This extended to a desire to contribute to the development of their local communities and country:

> "Because it helps to reduce women's ignorance in the country." (Respondent C004)

> "The second thing is that it helps for the country not to have a gender bias." (Respondent C053)

Good teachers and teaching: Scholars inevitably bring with them a view of teaching formed from their own experiences. These experiences could include interacting with teachers in different roles as learners, parents of school learners and, for a few, working as volunteer teachers (in schools or in non-formal education situations with the youth or adults) or in other education-related roles. These ideas form the basis of what "teaching is 'supposed' to be" (Akyeampong & Stephens, 2002). Scholars placed considerable emphasis on the personal behaviour, personal qualities and moral values of teachers. Many described a teacher as someone who needs a smart, clean appearance and to be dedicated, punctual, reliable, resourceful, tolerant, hard-working, honest and "of good character" (Respondent C027). At a classroom level, there was an emphasis on commitment to learners through caring and parenting: "… good women teacher is able to teach girls how to do their own cleanliness." (Respondent C013)

Scholars' responses indicated that they perceived that nurturing learners was key to being a good teacher. Many emphasised the importance of the relationship between learners and teachers. A good teacher was described as caring and friendly to learners, which creates a comfortable atmosphere in the classroom:

> "A good teacher should not be fearful to learners." (Respondent M96)

> "… to make sure when children making wrong that they be loved." (sic) (Respondent C15)

Teachers with such qualities were held to be role models for learners and more widely, in the community:"… to set a good example to friends." (Respondent C013)

Many scholars felt that female teachers were more likely than male teachers to possess these qualities and that they would be more capable of advising learners. Women were believed to be more accustomed to hard work and less likely to be distracted by drink and to enter into inappropriate relationships with learners. Their presence could reduce the gender differentiation and shift dominant cultural views about what it is to be "feminine" in schools: "… because a system of women abuse can be slow down in the schools" (Respondent C108).

Experience of childcare and knowledge of children was frequently cited as a skill that women would bring to teaching. There was a perception of teaching as an extension of childcare and activity in the domestic sphere.

> "She teach pupils like her children." (sic) (Respondent C072)

> "Women easily understand children because most women are mothers so they have a spirit of love for children." (Respondent C099)

A small minority of the scholars argued that studying and working in schools would prevent women from engaging in other types of "undesirable activities".

> "They can improve their education standard instead of going to the wrong places like bars and doing sex with married mens; they can be busy with teaching." (sic) (Respondent C070)

Experiences of learning: Applicants' writing revealed experiences of high levels of poverty and frequent interruptions to their learning. Barriers and constraints to learning included illness, economic issues and parental expectations. Experiences of bereavement (usually parental), illness (usually parental but occasionally themselves), pregnancy and husbands' behaviour all inhibited regular school attendance. Similarly, economic hardship (often as a result of poor harvest) interrupted schooling for many of the scholars. For some, there were insufficient family funds for school fees, clothing and study material and for others a need to be engaged in income-generating activity instead of attending school. For some, gender expectations and prejudices had impacted on their schooling:

> "Parents they encourage you to get married instead of school." (sic) (Respondent C072)

> "My parents believe that a boy have a right to go to school not a girl." (sic) (Respondent C057)

Many scholars expressed negative experiences of school. Teaching approaches, particularly in secondary schools, were felt to have been inadequate, insufficiently engaging or inclusive, with unattractive conditions in school classrooms. Many experienced an absence of encouragement or interest from teachers, physical punishment and inappropriate behaviour from male teachers. While these conditions and teacher behaviour affect both boys and girls in schools, the lack of value associated with girls' education and dominant male behaviour, including sexual harassment, suggest that the impact on girls was greater. Many had experienced a feeling of failure at their grades in crucial public exams (MSCE, JCE or the primary leaving examination). However, for some,

this had been mitigated by success at a later date. Threaded through these scholars' stories was the lack of possibility for agency in their own educational experiences and low self-esteem regarding educational attainment.

Discussion

Increasing the number of female teachers in rural areas in developing countries demands innovative measures to attract and retain community teachers. The programme described here is one response to these challenges, aiming to offer authentic situated learning experiences with high levels of support to rural women as they start to become members of the teaching profession. Crucially, while the project is aligned with global aims (Millennium Development Goals 2 and 3, UNDP 2013), it takes into account specific contextualising factors in Malawi and harnesses existing systems. However, the key to success in such a programme is developing an understanding of participants, their motivations, aspirations and prior experiences of learning and an understanding of the positions of those supporting them – their tutors and mentors – to inform materials and the design of support systems.

This programme attracted large numbers of applicants with an appetite for resumed study to achieve the MSCE and a professed desire to progress to becoming teachers. The initial work shows that many of the scholars construct themselves as failing in particular school subjects (especially Mathematics) and have negative experiences of secondary schooling. But many see themselves as agents challenging societal expectations and they want to re-invent their identities. There are few developing world studies examining factors that influence teaching as a career choice and even fewer that investigate trainees from more marginalised groups and their learning trajectories to becoming professionals. A recent study of secondary school trainee teachers in Malawi indicated that teaching is frequently a profession of last resort for those who have failed to gain university admission (Mtika & Gates, 2011), confirming similar findings from an earlier study of primary teacher trainees (Coultas & Lewin, 2002). In these studies and others (Towse, *et al.*, 2002), teaching was seen as a "stepping stone" to a higher-status professional activity. The scholars of this programme were much less likely to hold such views about their future roles, and as women in rural communities, few possibilities have been open to them to develop their capabilities.

Scholars perceive teaching as an essentially pastoral activity. Appearance and personal behaviour, particularly nurturing, are foregrounded as characteristics of a good teacher, underpinned by academic qualifications (MSCE) and competency in English. Descriptions of good teachers contained little reference to the practice of teaching or classroom learning, and lesson

planning was the only teaching skill mentioned. The social construction of the primary school teacher held by many scholars was synonymous with the constructs of "female" and "mother". There is much in common here with the views of beginning teachers in other environments in sub-Saharan Africa, but with a greater emphasis on pastoral care for pupils (Akyeampong and Stevens, 2002; Coultas and Lewin, 2002; Towse, *et al*., 2002).

Such views are influenced by participants' own experiences of schooling and family life. A significant number of scholars drew on their experiences with childcare or care of ill relatives to align themselves with their future role as teachers. Holding such views allows these women to visualise themselves as teachers without overtly challenging prevalent cultural expectations of themselves as women in their communities. Their multiple responsibilities in their own communities are not reduced while participating in the programme.

The material prepared by the programme adopts a highly participatory approach, seeing the learner as agentive (Bruner, 1996) and encouraging interactions with peers, relatives and friends. There is a large number of activities as well as self- and peer assessments. However, scholars' participation in activities and the meanings they construct will be highly influenced by their relationships with their tutors and mentors, and the views of learning held by these tutors and mentors and what they judge to be important (McCormick & Murphy, 2008). For the programme team, this mediation of the approach to learning by tutors (and mentors) poses critical challenges in achieving programme aspirations.

The mentoring dimension of the programme can be deeply challenging for mentors, not least because the programme material suggests new perspectives and ideas on learning that mentors may find unfamiliar and possibly threatening. Interview descriptions of the mentoring process revealed a hierarchical relationship between mentor and scholar. For example, some mentors insist that scholars write out answers to activities in draft for correction before completion in the actual workbook. Furthermore, the presence of the scholars as "learning assistants" may in itself threaten the identity of the teachers/mentors, particularly if they have become accustomed to being the sole adults in their classrooms.

The MSCE assessment framework is a key influence on the learning and teaching process, but the tutors – their views on pedagogy learning and knowledge – will also influence the way the curriculum is implemented and valued, as will their relationships with the scholars (McCormick & Murphy, 2008).

Various factors make the programme's approach to learning problematic. Firstly, the selection of the curriculum topics is challenging, because tutors are often dismayed to find that the material does not cover all aspects of the syllabus, and may use additional materials to supplement those in the

programme. This can cause information overload for the scholars. Secondly, the majority of tutors have little experience of distance learning, and struggle with this role. Many want to conduct tutorial sessions in the same manner as teacher-led transmission of knowledge. Thirdly, the project team is keen that the scholars are not perceived as "failures" or deficient in their knowledge, but should rather be treated as mature learners with extensive funds of knowledge to draw on. For many tutors, this attention to individual needs (characteristic of distance learning tutoring) is in conflict with their customary "teacher-centred" pedagogic practice.

Concluding Remarks

The programme is still in its early stages and, as yet, there is only limited data on the scholars' experiences to inform the development of the programme and to assess its success. Although distance education is not widespread in Malawi and few participants have any prior experience of it, the programme has been widely welcomed by participants, local leaders and key education stakeholders. Harnessing the flexibility of distance learning, the material aims to develop scholars' skills, knowledge and confidence as they juggle study with work and family duties. Initial data from the first cohort of scholars indicates they feel strongly that their presence is important to girls and to pupils generally, although many lack confidence in particular areas of study and in their ability to succeed academically.

The analysis to date indicates several areas where there is emerging non-alignment of project design and implementation. One such area concerns gender dynamics at a local level in the practices of tutors and mentors. Emerging evidence suggests that the prevailing attitudes of some members of these groups may be sustaining conditions that limit female empowerment. There is non-alignment between the learning approach inherent in the distance learning material and the practices in tutorials and mentor sessions.

Thus, a key part of programme is to increase researchers' understanding of the tutors' and mentors' histories of participation and learning brought to the programme, together with their views of the scholars. Without this, it will be difficult to disrupt tutors' practices and support them in rethinking their teaching styles and expectations for the scholars. This has implications for the types of learning activities these distance education tutors are requested to carry out with the scholars and the forms of guidance and induction for this group. Similarly, for mentors, there is a need to support them to think critically about their practices. Historically, distance learning programmes in Africa have given little attention to the perspectives of tutors, particularly with regard to issues of gender and poverty. Distance learning offers a path into teaching to groups previously under-represented in the profession,

particularly women in rural areas. However, a successful programme requires different thinking. This different thinking includes pedagogy, teaching and learning in relation to learners' identities to make any sustainable shift in the learning outcomes for females in these rural communities. This refers to both women on the programme and the girls in schools.

For the funder of the project, the key success indicator is the number of scholars who progress to qualified status and who, once qualified, remain in their local communities. Researchers are aware that there is a need to continue studies to understand the contribution it is making to their understanding of distance learning (material and support design). One should scrutinise the social and learning experiences of the scholars, their future activity and the influence of their presence in the participating primary schools. One should also consider the impact of programme participation on other role-players – mentors and tutors, and their practices.

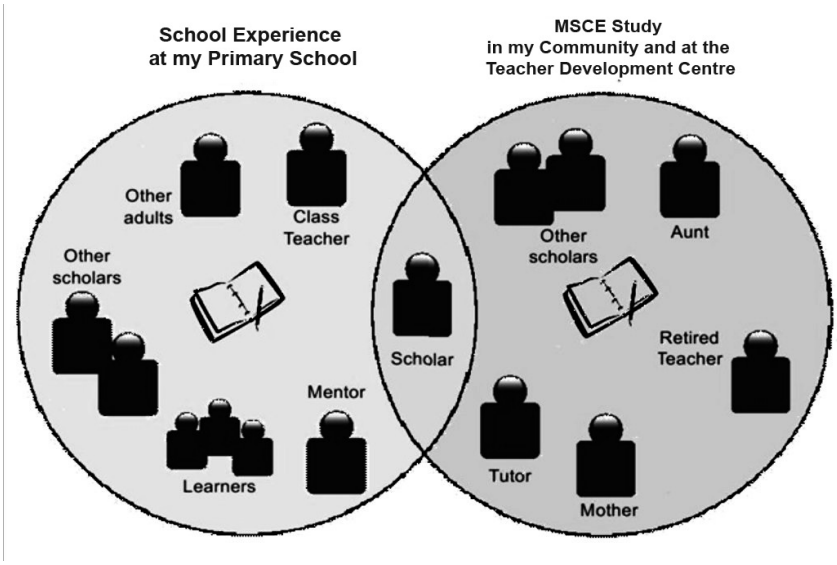

Figure 1: **Support for Scholars in the MATSS programme**

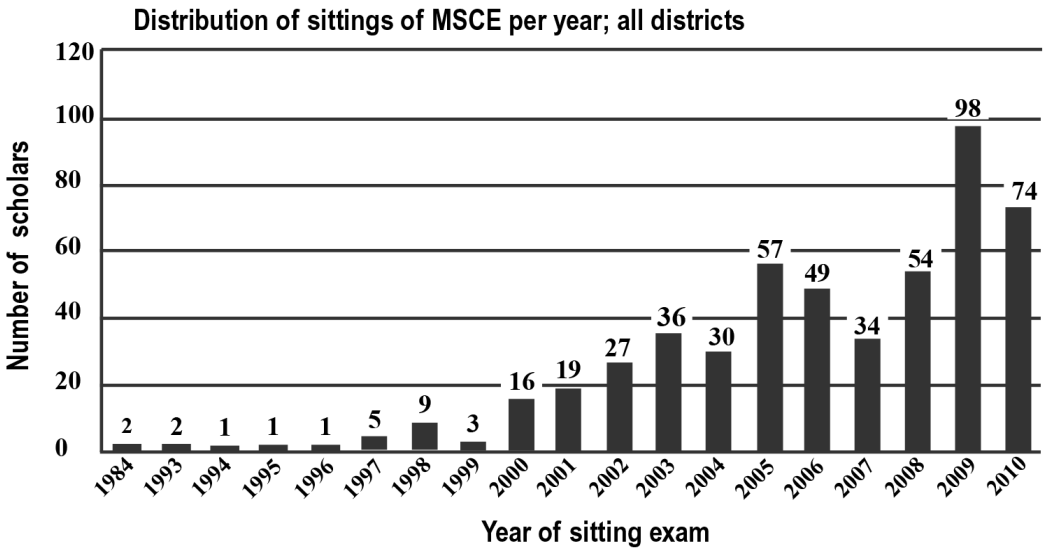

Figure 2: **Date Scholars sat MSCE Examinations**

Table 1: **Female teacher trainee recruitment**

Cohort	IPTE 1	IPTE 2	IPTE 3	IPTE 4
Year	2005/6	2006/7	2007/8	2008/9
Female intake	1276	1272	2,166	1,521
% female	45%	45%	55%	40%

Table 2: **Age Distribution of Scholars Across the 4 Districts, 2011**

Age band (%)	Chikhwawa	Dedza	Mwanza	Ntchisi	Total
<20	3%	2%	1%	8%	3%
20-24	49%	44%	41%	48%	45%
25-29	24%	38%	29%	31%	31%
30-34	13%	12%	17%	7%	13%
35+	6%	3%	8%	0%	5%
Data not available	5%	1%	3%	7%	4%
Grand Total	**100%**	**100%**	**100%**	**100%**	**100%**

Table 3: **Scholar MSCE Passes in each District**

District	Number of Subject Passes	Average passes per Candidate	Average Passes in the Key Subjects per Candidate
Chikhwawa	668	5.6	1.9
Dedza	735	6	2.0
Mwanza	822	6	1.8
Ntchisi	536	5.2	1.7

Table 4: **Passes in key subjects per district**

District	Biology	Physical Sciences or Science	English Language	English Literature	Maths	Total
Chikhwawa	55	19	108	0	42	224
Dedza	71	24	111	1	40	247
Mwanza	67	21	139	1	43	271
Ntchisi	47	13	91	3	27	181
Total	**240**	**77**	**449**	**5**	**152**	**923**

Table 5: **Scholar prior occupations**

	Business related	Education related	Office/ Admin/ secretarial	Farming/ agriculture/ villager	Family/ housewife/ Carer	Sales/ shop work	Domestic work	Student	Other	None	Blank (none given)	TOTAL
Total	**16**	**19**	**3**	**97**	**50**	**4**	**2**	**13**	**4**	**47**	**234**	**489**

1. *Prior to 2010 there was only one MSCE for English.*

Endnotes

(i) www.Tessafrica.net

(ii) MATSS is a joint programme from the Open University, UK (TESSA), and FAWEMA (Forum of African Educationalists Women in Malawi) with other local partners and is funded by the Scottish Government as part of the cooperation agreement which was signed between Scotland and Malawi in November 2005, outlining four key areas of engagement: civic governance, sustainable economic development, health and education. http://www.scotland.gov.uk/ Topics/International/Africa/Malawi.

(iii) Run by GTZ, this programme uses unemployed secondary school

leavers to support the learning of children who have dropped out of primary school.

(iv) Numbered quotes are from the scholar application forms. Other quotes are from interview data.

(v) Experiences of mentors on the programme are being explored in another strand of project investigation,and were reported in 2012.

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CHAPTER 7

Making Mentoring a Tool for Supporting Teachers' Professional Development

Hannu Jokinen and Jouni Valijarvi

Abstract

Teachers are key players in the implementation of the reforms required to promote social, intellectual and economic development. Considering the changes in teachers' working conditions, new teachers need help in learning to teach and in constructing a professional identity. The induction of new teachers takes place in different ways among Finnish schools. This article focuses on how mentoring is implemented in practice in the Finnish school context. The confidentiality of mentoring and discussion without risking criticism stimulated new teachers to reinterpret the meanings of situations central to their own work. Novice teachers found their place in the work community by encouraging them to engage in exploration, experimentation and risk-taking.

Introduction

The need to respond to an environment that is not only more diverse and open but also more complex than before is often perceived by teachers as problematic and involving new demands on themselves as professionals. The future challenges confronting education and teacher education are shared internationally (Esteve, 2000). They reflect a far-reaching process of social change that has resulted in increased levels of unhappiness among children.

A crucial problem besetting Finnish schools is dissatisfaction with school that affects both students and teachers and that is believed to stem from the pressures of work felt by teachers and from increasing restlessness among students and a growing lack of discipline in schools. Many teachers find interacting with their own colleagues not only a challenging task but

also a sometimes surprisingly novel idea (Valijarvi, 2000; Vilijarvi, 2005). In comparison to teachers in other countries, a Finnish teacher has a great deal of autonomy –but does this mean that the teacher is left alone to deal with the problems that arise behind the closed classroom door? Students' increased social problems and learning difficulties, in particular, are a severe test of teachers' traditional professional competence. Is teacher autonomy creating unreasonable demands that threaten teachers' professional well-being?

Teachers are Key Players

Teachers function at the centre of the changes underway in knowledge, skills and values and strive to meet the challenges that emerge in their action environment by developing their professional expertise through career-long learning (Day, 1999). Teachers are key players in the implementation of the reform required to promote social, intellectual and economic development.

One of the most important aims of the teacher of the future will be to awaken in their students a desire for lifelong learning. Teachers can achieve this objective only if they are able to demonstrate their own commitment to learning throughout the life cycle and continuous professional growth. Teachers cannot cope without an investment in on-going, career-long professional development that provides them with the ability to handle change and assesses and renews their knowledge and skills and their conceptions of what constitutes qualitative teaching.

Teacher education should lead the way particularly in efforts to make lifelong learning a reality. There must be a reform of teacher education before demands for changes in the work of schools can become credible. How well equipped are teachers and school communities to understand, make sense of and anticipate social change and its effects on teaching? How can we best promote teachers' abilities to respond rationally to these challenges and what kind of pre- and in-service training is best calculated to help them rise to the occasion?

A shared conception of the function of the school is breaking down, replaced by an on-going dialogue among and reflection on different ideas. In the future, teacher professionalism will mean a willingness to make an active contribution to this discussion and capabilities to influence the content of the debate. Today more than ever before, teacher professionalism is about collaborating with children and young people and with one's colleagues on the construction of the future.

Continuing Professional Development

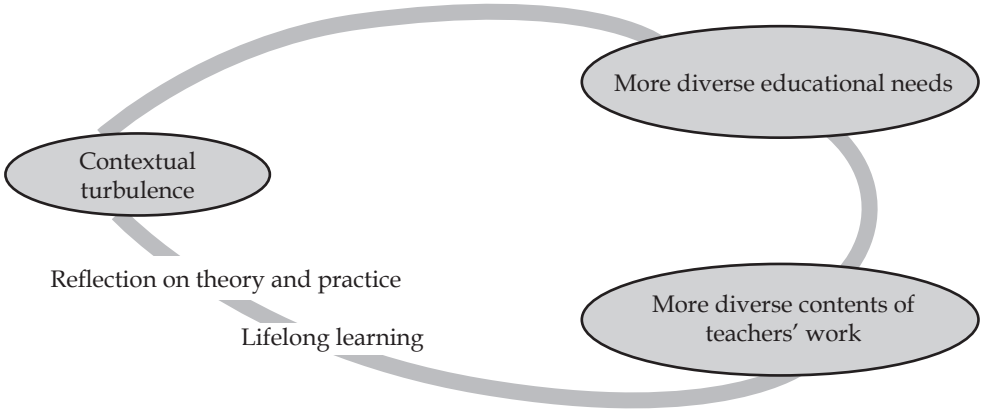
In-service training is an indispensable and potentially powerful element in teachers' professional development. However, Finland faces many demanding problems around the status and function of in-service training

(Jakku-Sihvonen & Rusanen, 1999). The importance of in-service training is emphasised on all levels of the educational system, but at the same time, there is a great deal of criticism of its current forms. Critics question how in-service training should be integrated into a continuum of professional development that will guarantee, on the one hand, the systematic development of the teachers' basic professional competence and, on the other hand, the consolidation, by drawing on teachers' practical experience, that have been strengths and special expertise accumulated in the classroom.

In Finland, any discussion about how to construct new models of education should begin with the premise, that in-service training must be given a more explicit link with teachers' pre-service or initial education. Education should be organised on the basis of each individual's own development plan, with its content and implementation negotiated between the teacher and the education provider. Goal-oriented, long-term and effective in-service training is possible only if teachers and their employees have sufficient common ground. (Cf. Makitalo, 1999).

A Reflective Continuum of the Teachers' Professional Growth

A problem that frequently interferes with the continuity of a teacher's professional growth is that there is not enough connecting tissue within and between the different stages of teacher education (Feiman-Nemser, 2001). The various phases of initial teacher education are often agglomerations of unrelated courses and field experiences. New teachers' induction into their first school is intended to help them to construct a professional identity and professional practises suited for the realities of the school where they are to work. Building a continuum of professional development requires cooperation and partnership among schools, education providers, teacher education departments, universities and trade unions. Cooperation makes it possible to negotiate shared principles to guide and support the relevant activities and work out a framework that serves as a basis for local discussion, interpretation and planning while leaving room for more specific conceptions of what teachers should know or be able to do (Figure 1).



Continuum of teachers' professional development

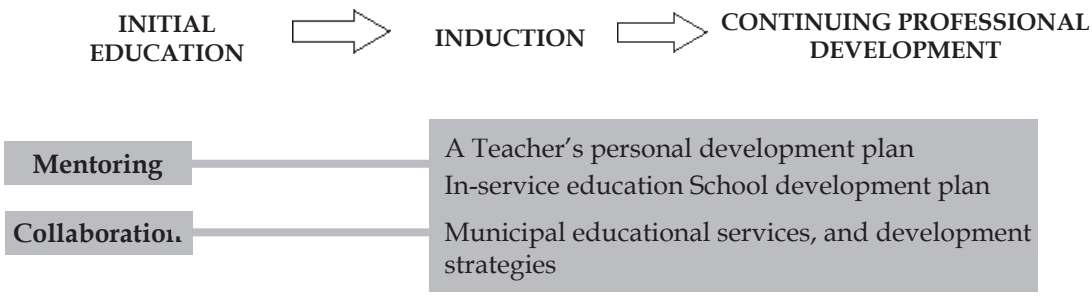


Figure 1: **Factors Underlying the Continuum of Teachers' Professional Development**

A continuum of professional development can and should consist of practises that encourage and motivate teachers to be active agents instead of passive purveyors of ideas or methods suggested by other people (Liebermann, 1996). Such a continuum may consist of many practices that support learning, such as courses, workshops and consultation sessions. Within an individual school community, the most important procedures include peer coaching, being critical friends, quality evaluation, appraisal, action research, portfolio evaluation, and collaboration on practical tasks. Outside individual schools, learning opportunities can be provided through cooperation between schools and universities, such as subject networks, many types of informal groups, and seminars about professional development.

In Finland, we have been accustomed to consider initial teacher education a responsibility of universities. In-service training has been delivered through cooperation among education providers, schools and individual teachers. The

gap separating theory and practise may be crossed in meetings that bring together student teachers, supervisors and university teachers. However, there are positive experiences from cooperation between universities and schools to support teachers' professional development (Knight, 2002; Syjalainen, 2005). Their initial education must familiarise student teachers, through daily activities, with the principles of continuous learning. The idea of a partnership between school and university helps to bridge the gap between theoretical and practical knowledge at the same time as it allows the further elaboration of either perspective.

Induction of New Teachers in the Finnish Educational System

Finnish schools have a formal statutory system for inducting new teachers. Education providers and individual schools can freely choose how to organise the orientation process. As a result, there are great differences among schools in the way in induction takes place. Data gathered both in the Jyvaskyla region (N=440) (Jokinen &Valijarvi, 2003) and nationally (N =2411) show (Jokinen & Valijarvi, 2005) that induction arrangements are casual and that often there is a failure to provide any induction at all. During induction, it was rare to prepare the ground for the new teacher's professional growth and the development of a professional identity.

As regards induction as a concept, a distinction has been drawn between three senses of the word; it can refer to: 1) the phrase during which new teachers learn to teach, 2) the process of their socialisation, and 3) a formal programme to induct new teachers (Feiman-Nemser *et al.,* 1999). In Finnish schools, the phase of learning to teach seems to be based on learning from practical experiences and problems. Finnish teachers interviewed on the subject emphasised that during their induction process, finding support depended mainly on their own initiative. They had to have the necessary courage and readiness to turn to their colleagues or the school principal for advice.

When induction is defined as a socialisation process, the emphasis lies on professional development and the professional community that new teachers are entering. Interviewees often reported that the school principal or one of the teachers had familiarised them quite briefly with the school's premises, modes of action, teaching aids and everyday routines. In some cases the new teacher might have been guided by an experienced teacher, for example by a colleague teaching a parallel grade, giving them an opportunity to find out about the school's action culture and tacit knowledge base. The emphasis was more often on adaptation to the work community and its modes of action that on the provision of conscious and systematic support for new teachers' professional development. Nevertheless, messages do come from more experienced colleagues and the work community about what it means to be a teacher.

Many teachers stressed that induction activities lasting only a few hours should be replaced by a long-term induction period ranging from a few week to an academic year. It was also suggested that a new teacher should have a sponsor or mentor who would assume responsibility for initiating them into the job. New teachers should have a say in decisions about the content of and procedures used in their induction. Induction should foreground the development of teachers' work and the construction of teacher identity. The aim is to ensure new teachers' personal and professional well-being and transmit the school community's action culture to the novice teachers.

Piloting Mentoring as a Tool for Supporting New Teachers

What follows is a discussion of how two different types of mentoring promoted new teachers' on-the-job learning and professional development. The data were gathered by interviewing novice teachers and their mentors and videotaping mentoring experiment carried out in Kokkola as group mentoring (five groups of 2-6 teachers, N = 19) and in Helsinki, as paired mentoring (9 mentors and 6 new teachers, N = 15).

The new teachers emphasised that the mentoring sessions had offered them an opportunity to talk about their experience and problems in an atmosphere of trust. In their mentoring groups, they were able to ask "stupid questions" without attracting criticism or being though incompetent. They were able to ask their questions without fear that these would reflect poorly on them and affect their future in the school community.

As the newcomers saw it, mentoring offered them support and encouragement in the choices they had made at school. The mentor's questions and comments helped the new teachers analyse and critically assess their own teaching activity and functions. The new teacher saw the mentoring groups as a form of peer support. The discussions conducted within the groups provided hints for their own work and a chance to learn from the choice of other new teachers. The mentoring process and the help and support it made available lived up to the new teachers' expectations.

The topics discussed during the mentoring sessions were mainly issues raised by the new teachers. Everyday problems and challenges, such as problem pupils, pupils' behavioural disturbances, interaction with their parents and cooperation with fellow teachers, were frequent topics during the group discussions. The discussions brought up alternative solutions to the problems that the new teachers had faced. The process of developing as a teacher was considered in terms of the newcomers' own strengths and development targets. More frequently than the other groups, a mentoring group consisting of special education teachers took up particular pupil cases and the measures associated with them. These discussions were often conducted as paired mentoring between a mentor and

a novice teacher. The groups looked also at school practises of a kind that new teachers had not been told about during their induction. Mentoring sessions rarely considered pedagogical or didactic decisions or arrangements directly related to the classroom, such as issues regarding how some specific content should be taught to particular pupils. These topics emerged more often among upper secondary school and secondary school subject teachers. The subjects raised during the discussions seem to be linked with areas that had, in the new teachers' opinions, been given too little attention in teacher education.

In both group and paired mentoring, the mentors saw their roles as being primarily about listening to the new teachers and sharing their experiences and problems. Experienced teachers wished to support novices' decisions, but at the same time, they also saw it as important that new teachers learned to assess their decisions themselves. The mentors did not want to provide ready-made solutions; their aim was to collaborate with the new teachers in finding alternative approaches or solving a problem. Paired mentoring made possible a more detailed and individualised examination of the problems that emerged during the sessions.

As the mentors saw it, their task was to guide the discussion towards issues that were important as factors in developing as a teacher. The mentors emphasised that they themselves learned from the discussions and the new teachers' opinions. They stressed that there is a need to learn how to help to combine the newcomers own questions with reflection on the central factors affecting the learning to teach process.

Group Mentoring as a Dialogic Process

The mentoring groups developed also action models for solving acute problem situations. Under the mentors' guidance, the new teachers were given an opportunity to look at conflicts involved in the work at school from new constructive perspectives. The extract below is an excerpt abridged from a mentoring group session of three mentors and five new teachers. As the session opens, a new teacher brings up an issue related to her own work to which she has been unable to find a "right" and "safe" solution. The dialogue leads to a comprehensive solution that contributes to the general educational function of the school (Jokinen & Sarja, 2006).

The mentors had confidence in the new teachers' abilities to engage, in a familiar group, in open interaction. It appears that it is the atmosphere of dialogue and trust created by the mentors that embolden the new teacher to take up the problem. The matter (*clearing up a theft*) disturbs the teacher so much that she finds it difficult to concentrate on her teaching. Her readiness to openly disclose her uncertainty creates, within the group, a meaningful object of shared interest that prompts the mentors and the other teachers to contribute their own experiences and views. The dialogue is driven forward by direct questions from the mentors,

such as: *What shall we talk about today? How have you approached the situation? Are there witnesses? Could you use the classroom community to deal with the issue?* During the discussion process, the mentors and the new teachers share also their own experiences and the tacit knowledge that they have accumulated in their work as educators. For example, they made these suggestions: you might conduct an anonymous query; What about using community spirit by appealing to feelings; Why don't you ask directly and You might appeal to the children's intelligence. The mentors touch also on such ethical questions involved in teaching as the responsibility that school has for children's moral education. They come up with remarks such as: 'Young children can have a hazy idea of right and wrong; You cannot blame a suspect without evidence; Someone must notify the police'. In fact, it is such more general ethical reflections that enable the teacher group to find a solution which supports the school community's educational role. Because education for obedience to the law is among the tasks set for school, the police are invited to visit the school and discuss the issue on a general level. Such interaction between practise and theory leading to a new solution is an indication of the dialogical nature of the mentoring session.

Making Mentoring a Resource in the Teacher's Work

The results of our experiments demonstrated that because teacher professionalism increasingly involves mastery of functions belonging outside the classroom, Finnish schools need mentoring as a tool to support the development of new teacher professionalism. The teachers considered mentoring in the induction phase so important that they wished it to become a continuing practice. Mentoring offers new teacher practical stimuli and an opportunity to enter into what may be called a therapeutic discussion on topics around teaching and the functioning of the school community.

Mentoring can be used as a discussion tool to address innovatively, issues and problems that challenge new teachers. Here mentors contribute to the conceptualisation of everyday phenomena brought up by teachers – a dialogue between the experiential world and theory. The process was successful both in paired and group mentoring. The new teachers found it helpful that they were mentored by people from outside their own school community. A session organised in a neutral space made possible open interaction based on trust. An atmosphere of mutual respect and reciprocal dialogue gave the new teachers the courage to speak frankly about their own experiences and, simultaneously, interact with other new teachers and school cultures.

They felt comfortable questioning mentors they had not previously met and receiving their comments and feedback. Discussing shortcomings in their competence and their problems within their own school community felt more difficult because they were afraid that this would affect human relationships within the work community. This choice of approach means that mentoring lays

more emphasis on individual than on community problems. Accordingly, in the future, we need to investigate the feasibility of organising mentoring within a new teacher's own school community. Is the new teacher's own school a place where it is possible to create, as a context for discussing their problems, an atmosphere of trust as strong as in mentoring outside school? Will mentoring evolve into a tool for communal change or will it remain a means of supporting the development of the individual teacher?

Mentoring as Empowerment

The experiment participants found the informal character of mentoring an advantage. Evaluation and socialisation into the prevailing traditions of a school community are not a part of mentoring. Mutual reflection among the mentees promoted their learning to teach process and helped them to build their own professional identity. The mentoring process that we examined unfolded in an atmosphere of trust as equal and reciprocal dialogue and discussion. It offered the participating teachers practical stimuli and an opportunity to enter into a 'therapeutic' discussion. Mentoring seems to consist of contextual, constructive and emotional support for learning to teach and for identity development.

Within the dialogic process, peer support and the varying practices of different school communities offered tools for conceptualising the phenomena of everyday life. Mentoring is a procedure that helps novice teachers find their place in a work community by encouraging them to engage in explanation, experimentation and risk-taking. This makes it possible to put to use the rich resources that a newly qualified teacher has to offer to their future school community.

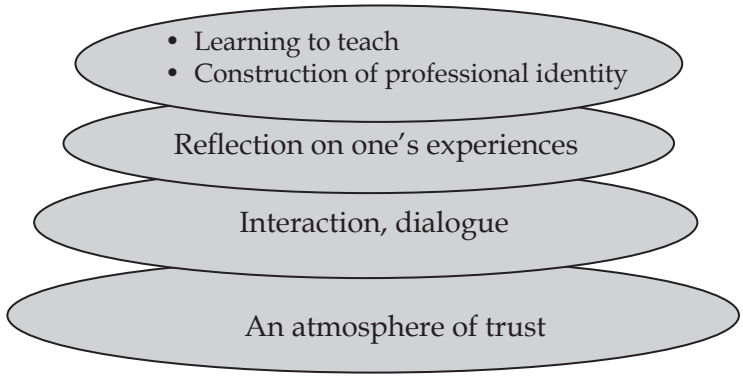


Figure 2: **The Characteristic activities of mentoring**

New teacher professionalism means more collegial collaboration, more sharing of different practices and more mutual support than before. The teacher community is constrained by a rooted and powerful myth of individual

competence, one of the factors that make it difficult for teachers to share their burdens with colleagues. New teacher professionalism means increased overall responsibility. Valuable knowledge is transmitted in functional contexts, in joint meetings between mentors and new teachers. Teacher mentoring makes possible to address disturbances in school in a collaborative manner and discover solutions best suited to support the functioning of today's school. However, one problem remains to be solved: the development of mentoring as a method of learning at work in ways that make its outcomes truly felt as an influence on the everyday life of the school. Achieving this presupposes accepting shared responsibility for the organisation of the new teacher's induction phase. The induction phase must be made, in cooperation between teachers, schools, education providers, trade unions and teacher education departments, a well-defined stage of a continuum of the teacher's professional development that starts in teacher education and continues throughout the teaching career.

Mentoring cannot be a substitute for new teachers' induction into their school community, but it can be a central activity during teacher induction.

Another challenge is about implementing the induction phase in a way that will, instead of socialising the novice teacher primarily into the existing practices of the school community, make full use of the rich resources that newly qualified teachers have to offer to their future school communities. Is it possible to extend mentoring to reach the new teachers of all schools? Organising mentoring does not appear to require large financial outlays. Is it possible to locate in the budgets of municipalities and schools the resources needed for organising mentoring by exploiting and reallocating those that already exist? These might include resources set aside for the education and planning activities stipulated in teachers' collective bargaining contract and for in-service training. It is an opportunity for mentoring to make an in-service training more individual and flexible to teachers.

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CHAPTER 8

Language-In-Education Policy and Linguistic Diversity in Zambia: An Alternative Explanation to Low Reading Levels among Primary School Pupils

Felix Banda and David Sani Mwanza

Abstract

The chapter is motivated by the recent interest shown in the pedagogical benefits of multilingual discourse in classroom practices in multilingual and multicultural contexts; and the dissatisfaction with monolingual/ monoglot one-language-a-time discourse practices that still pervade language education (Williams, 1994; Baker, 2003, 2011; Garcia, 2009; Banda, 2010; Hornberger and Links, 2012). The chapter should be seen as contributing to the shifting paradigm in learning and teaching in multilingual and multicultural contexts, in which pupils' linguistic repertoires and related cultural heritage are seen as central rather than peripheral to classroom practice (See Garcia 2009; Banda 2010; Hornberger and Links 2012, for similar arguments). This entails a move away from typical Western education models, premised on the One Nation, One Language, or and in the case of Zambia, One Province, One Language monoglot/monolingual approach, to models that draw on pupils' multicultural and multilingual heritage as a way to bridge home/community and school-based literacy practices. For initial literacy development in multilingual contexts of Zambia, this might entail use of more than one language, including hybrid forms, to ensure pupil involvement in classroom practices, and hence a learner-driven and centred pedagogy (Williams, 1994; Baker, 2003, 2011; Garcia, 2009; Banda, 2010; Hornberger and Links, 2012).

Keywords: Learning assistants; Malawi; women; rural schools; teachers; distance learning

Introduction

Most studies on language education planning and policy in Africa, have focused on the role of colonial languages in undermining the use of African languages in classroom practice. The chapter problematises the use of zonal or regional standard African languages at the expense of other (African) language varieties for initial literacy development as a continuation of colonial monoglot/monolingual model. In this regard, this chapter identifies three phases in the introduction and subsequent entrenchment of English as a language of education, commerce and official government business; as points of departure to analyse why attempts to use the mother tongue or what is called a familiar African language for initial literacy development have not been very successful so far. In turn, we use Haugen's model of language standardisation (Haugen, 1966a, 1966b, 1972, 1987) to background Bourdieu's notions of symbolic violence and misrecognition of the standard language as the sole legitimate language of official business and education (Bourdieu, 1990, 1991), to discuss how outdated orthographies and use of regional language have impaired initial literacy development in multilingual contexts of Zambia. Here we focus on the monoglot/monolingual ideology pervading institutionalised language planning and policy and models of classroom practice as impediments to initial literacy development as pupils' multicultural heritage and multilingual repertoire are sacrificed at the altar of a zonal language, which is not necessarily familiar enough to be useful to a child's learning needs. Thereafter, we argue for multilingual models of education and classroom practices which take advantage of the child's multilingual heritage. We briefly discuss a new approach called translanguaging (Garcia, 2009; Hornberger and Links, 2012) as offering pedagogical possibilities for multi-literacy development and to counter the monolingual ideologies and policies in place and the hegemonic negative effects of the valorisation of the misrecognised standard varieties of Zambian languages as the legitimate languages of initial literacy development (see Banda, 2010 for similar arguments on alternative models of bilingual education). We conclude by arguing for language education models and classroom practices in which Zambian languages, English and other language varieties are used as equal partners in initial literacy development. Such models should be designed in such a way as to bridge home/community and school-based literacy practices.

Historical Background of Language-in-Education Policy in Zambia

There have been twists and turns in the formulation and implementation of language in education policy in Zambia. This dates back to the time the missionaries came to settle in Northern Rhodesia (present-day Zambia) and started their mission of evangelism and in the process, established schools. By definition, Trask (1997) refers to language policy as an official government

policy which regulates the form, teaching or use of one or more languages within the area controlled by that government. Language policy can also be explained as a set of interventions pronounced and implemented by states which are supported or enforced by law. Evidently, for language policy to work, it needs to be accompanied by effective status and corpus planning initiatives to formalise the use of a particular language in education as well as to create and ensure that sufficient vocabulary is available for use by learners and teachers.

Following Banda (2009), an identification of three phases in the introduction of English as a language of education in Zambia is required. The first phase started with the partition of Africa in 1888 until 1924. The British South Africa Company (BSA) ruled what was to become Zambia from around 1890 to 1924 on behalf of Britain. The British government took direct control thereafter until 1964 when the new African government, under Kenneth David Kaunda took the reins. The British South Africa Company's interest was to exploit the country's mineral wealth. Thus, it was not surprising that during their reign, they only built one school; the Barotse National School (Mwanakatwe, 1968).

Whereas the missionaries who had arrived before the 1800s to set up mission posts and schools depended on local languages for their work, the British South Africa Company came with English mother tongue settlers and hunters; and as Banda (2009) notes, the company and settlers relied on mission schools to provide Africans who worked as artisans and general labourers in homes and farms, and also worked as administrative staff, for example, clerks and support staff to Europeans. Thus, knowledge of some English slowly but surely started to matter most to Africans.

The missionaries continued to set up churches, hospitals and schools but under the jurisdiction of the British South Africa Company which was the overseer of the territory. Since they had realised from the outset that the best way to publicise their message was through the Africans' own languages, the missionaries almost entirely used local languages to teach reading, writing and numeracy. Commenting on the missionaries' use of local languages, (Manchishi, 2004: 1) notes:

> …the drive for evangelism proved extremely successful because the missionaries used local languages. The Bible and other Christian literature were translated into local languages. People chanted hymns in the language they understood best i.e. their own local languages, and even in the schools, the medium of instruction was in their own local languages at least up to the fourth grade.

Thus, even with the best of intentions, English was to be used in some form after Grade Four. At the very least, it is reviewed that missionaries instigated the beginning of a more or less formalised language policy in

education involving the use of both English and local languages as medium of classroom instruction. With the monoglot/monolingual ideology in place, local languages were taught using the local language concerned, while the rest of the subjects were supposed to be taught in English.

However, we need to note that, albeit in the mother tongue, the missionary curriculum, if we can call it that, had very little in terms of content because education was designed for few Africans to read and understand the scriptures themselves so that they could become passionate Christians able to convert other Africans. This is apparent in the letter by the Secretary of the London Missionary Society to a young missionary who arrived in Zambia in 1900 which reads in part:

> It is most important that the converts should learn to read in order that they attain a fuller knowledge of the Scriptures, when the Scriptures can be provided to them, but I think it is even more important that they should learn to live self-respecting, progressive Christian lives. The mission that turns out good carpenters and blacksmiths does more among such people... than that which turns out good readers and writers (Mwanakatwe, 1968: 12).

As explained above the teaching was not designed to make Africans 'good readers and writers' and, thus, be able to produce their own reading and teaching materials from their own sources and social contexts. This meant Africans were taught a little technical terminology in English, just enough to make them understand few of such terms in the verses and scriptures during the transcription of the Bible into pamphlets and other reading material for use during evangelisation missions in the communities.

In short, there was very little in terms of quality language teaching of both African languages and English, as well as in the content of the curriculum. Rotberg (1965: 45-46), captures the situation succinctly when he quotes a Father Guilleme who described the work of White Fathers at the turn of the twentieth century as follows:

> ... to teach the natives in the knowledge of Christian doctrine and morality, to instruct the more intelligent among the children and the young people to serve, when time requires, as assistants, to teach them all to work in the fields, and to train the more possible of them as carpenters, masons, sawyers, etc., according to the wants of the country. So, in every station, we have the Christian doctrine teaching for all, old and young people, about 20 minutes a day (Rotberg, 1965: 45-46).

It was manifest that Africans hardly acquired any English skills because the first four years of education were in one of the four official local languages -Cewa/

Nyanja [Henceforth Nyanja], Bemba, Lozi and Tonga. Luvale, Kaonde and Lunda were made official after Zambia's independence in 1964. Although the use of English was limited as described above, English was often introduced as a subject only from the fifth year. Moreover, missionary societies were mostly averse to teaching English or academic education. The London Missionary Society (Anglicans) and the Free Church of Scotland (Presbyterians) were among the few mission societies that taught English and offered anything resembling academic education (Gadsden, 1992; Siegel, 1999). For the few Africans that went to school, their education ended by grade 3 or 4 as most schools ended their education in the fourth grade anyway. The majority of mission societies were content on offering the barest minimum of schooling in indigenous languages, and with a very limited curriculum in terms of content.

Therefore, in this phase of missionary direct control of schools, education was generally ineffectual and unsatisfactory, and as far as English was concerned; it did not feature prominently in the curriculum. It is not surprising, therefore, that when the British colonial office took over, one of the first things they did was to reign in mission schools, and 'forced' them to improve the quality of education (Banda, 2009). However, with the increase in British involvement in the running of mission schools, more English was introduced in the curriculum of these schools. At this time, the copper mines were increasing, and administrative outposts called *Bomas*, through which the British government ruled Northern Rhodesia through District Commissioners, were also burgeoning (Banda, 2009). Banda (2009), argues that the establishment of administrative positions in the mines and the civil bureaucracies in the *Bomas* necessitated the need for an educated civil service. He further notes that even though English did not feature much in the curriculum, the irony of the education system was that the few Africans that could speak rudimentary English found themselves 'lucrative' jobs as *kalaliki* ('clerks'), *kapitao* ('captains) in the civil service, the farms and the mines, or as district *kapaso* (messenger) to work alongside white civil servants and District Commissioners, who collected taxes on behalf of the Queen of England. These positions obviously gave these few Africans a lot of power over fellow Africans and their status was only second to that of the white colonialists and missionaries. Thus, even before the direct British rule was instituted, the first ingredients of English hegemony had been planted because those with little knowledge of English were rewarded with different roles and high status in society.

The second phase started in 1924 by the British colonial office who took direct control of the administration of Northern Rhodesia from the British

South Africa Company (Banda, 2009). Further, the poor education offered to Africans by mission societies prompted the British colonial office to set up the Phelps-Stokes Commission which was charged with formulating recommendations for the effective development of African education.

Thereafter, the Commission recommended that the colonial government should increase its budget on education which should take the form of grants-in-aid to the mission societies, and predicted that such an investment would eventually 'be reflected in better health, increased productivity and a more contented people' (Phelps-Stokes, 1924: 265). And as far as the language of instruction was concerned, the commission recognised the complementary roles that English and local languages could play in personal and national development. As a result, it recommended that English be used as the official language in education and government business while local languages were to be used for the preservation of African cultural values and ethnic identities. As a result of the recommendations, the government formally recognised four main local languages; Bemba, Nyanja, Tonga and Lozi as regional official languages to be used as media of instruction in the African government schools for the first four years of primary education. This policy declaration was a major development in language policy formulation for Northern Rhodesia with regard to medium of classroom instruction and, by extension, to the language of wider communication by zone. It was argued that even though the declaration gave legal status and appeared to acknowledge the importance of local languages in education, it inadvertently promoted English above indigenous languages by pronouncing it as the official language of government and business, and education generally, especially after grade 4.

A special note is that the Commission understood that the colonial government did not have the capacity to go it alone in providing effective education for Africans. Thus, it urged each mission society to establish a central training institution where qualified trainers could instruct necessary knowledge to future African teachers.

It is argued that the zoning of languages was arbitrary in the sense that it did not reflect the multilingual contexts in different geographical locations. Thus, the implementation of language policy in 1953, created the problem of a three tier language policy. It was not uncommon for a pupil to be taught in a less dominant mother tongue for the first two years of primary education. Thereafter, the pupil would be taught in a more dominant regional official language for another two years and then in English from the fifth year onwards (Chanda, 1998: 63; Kashoki, 1978: 26). Clearly observed was the beginning of a situation where African languages were relegated to early literacies before learners could be channelled to English medium, giving the ideological basis that the languages could not cope with advanced and specialist content. Thus, 'instruction through a local language was invariably seen as a transitional phase prior to instruction in English' (Ansre, 1979: 12).

Associating higher grades with English also added to perceptions that African languages were only good for lower level education. The third phase coincided with Zambia's attainment of independence. Its highlight was the proclamation, of English as the sole official language in 1966 at national level and as a language of classroom instruction from grade one to the highest level of education.

At independence in 1964, the majority of Zambian primary and secondary schools were still being run by missionaries. It became apparent to the new black government that the envisaged improvement and expansion in education establishments would not succeed without the involvement of missionaries. According to Mwanakatwe (1968), the new Zambian government planned to expand the education sector while government financed the extension work up to 75 per cent of the total cost incurred by mission owners of secondary schools, and up to 75 per cent of new mission secondary schools. However, this was a forced arrangement as the government was interested in taking control of the education sector, as Banda (2009) notes that participation of missionary societies in the education sector depended on the latter acquiescing to what the government dictated. Consider the following statement from John Mwanakatwe, the first Zambian Minister of Education:

> …the Ministry of Education has continued to welcome the participation of voluntary agencies, whether churches, mines, industry, or other recognised groups more particularly in the post-primary field where the need to supplement Government's effort is considerable. But the basis for continued participation of voluntary agencies in education development must depend upon their willingness to comply with school regulations issued by the Ministry from time to time. (Mwanakatwe 1968: 130).

However the case may seem, Roman Catholic agencies, to some extent, resisted some of the regulations because they had their own funds to continue to build and extend existing structures without calling on the government to help. Other missionary societies succumbed to government pressure and 'voluntarily' handed over their schools to government. However, the argument here was that, with the adoption of English as the medium of instruction in Zambian schools in 1966 in urban areas in particular, it was the missionary-run schools, that would bear most of the burden of delivering the policy.

In essence, the legacy of marginalisation of African languages continued, but it was this time perpetuated by emergent African leaders. As in colonial times, mission schools were expected to carry out government mandates and in particular the policy after 1965 of using English medium of instruction in

all schools. And, the Zambian government expected the mission schools to play a critical role in the New Peak Approach, a chosen teaching approach which was conceived around English as a medium of instruction.

Ohannessian (1978b), argued that even if there was to be commitment to have universal education in mother tongues especially after Zambia's independence in 1964 it would not have worked because missionary education was desperately inadequate, and did not prepare Zambians for expert teaching in various content subjects using indigenous languages in primary and secondary schools. In fact after 1964, a study of the teaching of Zambian languages in schools and colleges revealed that teachers and lecturers had little or no linguistic knowledge of the languages they were teaching, and more alarming was the discovery of the 'extreme meagreness of linguistic content in courses as regards material in and about these languages'. (Ohannessian 1978b: 319). This appeared to force teachers to teach Zambian languages in English.

In spite of ushering in of African majority rule, Zambia still relied on mission schools and expatriate staff who taught in English. The government introduced the New Primary Approach (NPA) to teaching with the onset of the English medium of instruction in 1965-66. Banda (2009), observed that the NPA, modelled on Kenya's New Peak course, was touted as a new approach designed to discourage the mechanistic grammar translation and the audio-lingual approaches to the ubiquitous language teaching/learning during colonial times. The NPA was supposed to enhance English communication skills in learners by emphasising situations and contexts in teaching. It emphasised group work among learners rather than the teacher being at the centre of the lesson. Banda (2009), further argued that the teaching approach promoted the 'Zambianisation' of English as learners developed their own accents often quite different from their (white) teachers. He further noted that after 1975, the teaching of English increasingly came into the hands of Zambians.

In terms of classroom practice, the first year of English learning the NPA course focused on oral communication. In essence what happened was that teachers were asked to teach minimal pairs, for example, in situational or situated contexts instead of mechanical 'minimal pair' drills. An approach described as multi-modality was encouraged because teachers were encouraged to add pictorial displays and/or role-play to their teaching (Banda, 2009). However, reading and writing were taught later at the end of term one of the three-term calendar year. The situation/contexts during year one of schooling were the home, the classroom and the school. In year two, the situation/contexts of interest shifted to the neighbourhood, the general shop, the game park, the farm and the town. The centres of interest became increasingly complex up to Grade 7 in the third term. Evidently, if 'literacy' is defined as

the ability to 'read and write,' the delay did not make sense as it is feasible to have both the oral/aural component as well as reading and writing.

The Ministry of General Education instituted the Primary Centre in 1965 with the mandate to produce primary school materials. Initially, there were five languages and accompanying teaching specialists at the centre, two of whom were made available by the British Council. The personnel at the centre were charged with the responsibility of writing learning; and teaching materials, and in the training of administrators and teachers in the use of the new materials. The Curriculum Development Centre (CDC), took over the functions of the Primary Centre. Banda (2009), ironically notes that the CDC was set up in part because the mission societies and the British colonial government did not provide relevant and sufficient materials in both Zambian languages and English. Yet, after independence, the emergent leaders were still dependent on mission societies and British agencies to provide the expertise, manpower, and training skills required for effective teaching, as well as the production of learning materials.

It is not clear what happened to the NPA programme, but the CDC has continued to produce materials for primary and secondary schools in Zambia. The other statement is whether the NPA was successful in developing English competence. One criticism often levelled against the NPA is that it was too focused on communication and ignored the essential grammatical aspects of the language, which were equally important. Another criticism was that it often produced learners who could speak some English but were unable to write it. Since examination tested written competence, such learners still failed the examinations. In any case, the various education reforms that have been taking place since the 1970s are testimony of the dissatisfaction in the NPA, and teaching increasingly language education in English.

Education Reforms

The 1977, education reforms recommended continued use of English as a language of education while making provisions for the utilisation of the seven official local languages. This was despite having acknowledged the weaknesses of using English as a sole language of classroom instruction. Simwinga (2006), observes that by 1992, it had become increasingly clear that the use of English as a language of instruction was not working well particularly at lower primary school level. In 1992, the Ministry of Education revisited and reappraised the language in education policy. It was found out that the policy had weaknesses which included: downgrading of local languages, isolation of the school from the community, alienation of the learner from tradition and impairment of children's future learning. With these weaknesses in consideration, the

1992 policy document recommended that the Ministry of Education should institute a review of the primary school curriculum in order to establish the main local languages as the basic languages of instruction from grades one to four. The 1992 recommendation provided the teacher with a greater freedom to determine 'the main local language' to be used as the language of instruction.

In another reform initiative, the 1996 policy document (*Educating Our Future: National Policy on Education*) also retained the use of English as the official language of classroom instruction and, in addition, recommended the employment of familiar languages to teach initial literacy in grade one. The policy stated:

> …all pupils will be given an opportunity to learn initial basic skills of reading and writing in a local language... officially, English will be used as a language of instruction but the language used for initial literacy learning in grade one will be one that seems best suited to promote meaningful learning by children (Ministry of Education, 1996: 27).

In 1998, there was another turn; the New Break Through to Literacy programme (NBTL) was unveiled as a pilot study in Mungwi and Kasama districts of Northern province. The study involved an experiment of using a familiar language as a medium of instruction to teach literacy in Grade1. The results showed that pupils were able to read by the end of grade one and that, the level of reading for grade two pupils was to be equivalent to grade four pupils who had undergone the English medium. As a result, the project was scaled up to all schools in Zambia under the programme titled, 'Primary Reading Programme (PRP)' (Manchishi and Chishiba, 2014). The notion of learning through a familiar language was interesting in that it was conceivable that such a language was not one of the seven official languages or the one earmarked for that zone. Since familiar languages in communities were not necessarily 'standardised' there was also an interesting prospect that the languages were not necessarily the formalised ones. As a result, the use of a familiar local language as a language of initial literacy went on up to 2013.

At the beginning of 2014, another language education policy shift occurred. The government announced that the language of instruction from Grade 1 to 4 would be one of the zoned seven official Zambian languages. From Grade 5 onwards, English would be the language of instruction up to the University. It must be mentioned that the 2014 policy framework was not a new policy. And, the use of a Zambian language up to the fourth grade had existed during the time of the missionaries and in Government schools during the 1950s up to 1965. Thus, the current policy recommendation could be viewed as a revitalisation of the missionaries' policy. However, there is need to distinguish

using a 'Zoned' official Zambian language and a local language, which may not necessarily be a 'Zoned' language or standard Zambian language.

Reading and Writing Abilities among Zambian Pupils in Early Grades

Our discussion of standard language is framed in Haugen's model. A comparative approach to language standardisation is taken, which 'describes not only (synchronic) similarities in the form and function of standard languages, but also… relates these to language history and development' (Deumert and Vandenbussche, 2003: 4). In this regard, the approach to the discussion on language standardisation is based on Haugen's (1966a, 1966b) and later elaborations (Haugen, 1972 and 1987), 4-step model: (1) norm selection, (2) norm codification, (3) norm implementation, and (4) norm elaboration.

What is important is that language standardisation entails reducing language varieties, and since the process includes norm selection and codification, it means there is an artificial attempt to 'stabilise' language. The argument is that the first two and fourth processes were done by missionaries and colonial agents. Note here recent attempts to elaborate standard African languages, for example, through harmonised orthographies which are often resisted (Banda, forthcoming) so that attempts to improve reading through orthographic reforms are thwarted. And, because someone else selects and codifies language to provide the norms, the standard language does not always reflect the varieties of the languages as spoken by ordinary people. At this juncture, it is essential to reflect on Haugen's (1972: 246) observation that, 'it is a significant and probably crucial requirement for a standard language that it be written.' Thus, the written form allows for a model on which rules are prescribed and fixed and eventually, '[s] poken standard norms [are] established on the basis of the written model' (cf. Scaglione, 1984: 13–14).

The standard language is, therefore, best described as reflecting the written language rather than one readily spoken in the communities. This conceptualisation is critical in understanding why attempts to use regional standard languages, to promote initial literacy in Zambia, have proved difficult as shown in the various studies reviewed in this chapter. In practice, the 'zonal' or regional official Zambian language, which is the standard variety, also creates a hegemonic existence of language varieties and speakers (Blackledge, 2005). This represents what Bourdieu (1990) calls *symbolic violence* in which the standard variety is legitimised through institutionalised discourses of education; the courts, media, politics, economics and so on, while the rest of varieties become illegitimate codes or unofficial languages of communication. Through national and education language policies, the state can be said to be involved in creating the framework on which hegemonic language ideologies are founded in 'the production and reproduction of social difference, constructing some languages and varieties as of greater worth than

other languages and varieties' (Blackledge, 2005: 33). This misrecognition of the standard variety as the legitimate code becomes a reality because the dominated and dominant social groups are complicit in the 'institutionalised circle of collective misrecognition' (Bourdeu 1991: cited in Blackledge 2005: 33).

The misrecognition of the regional standard language as the legitimate language of initial literacy in multilingual contexts of Zambia is implicated in a number of studies reviewed below. Most of the studies have reported that pupils have not been able to read and write at desirable levels in both languages as a result of choices in the language of initial literacy. When a familiar language was used during the first year of schooling, the expectation was that the child would be able to transfer the skills learnt in the familiar as a stepping stone to learning the mechanics of reading and writing in English. However, many studies have blamed the 'short' one year period as not adequate as pupils moved into grade two before they could read and write. Hence, they did not build enough cognitive knowledge for learning reading and writing in the Zambian language and English. Our argument is that there is urgent need to address anomalies and contradictions in the orthographies, and recognition that the official standard language of education is not necessarily a familiar language to pupils and teachers alike.

Mulenga (2012), conducted a study in which he wanted to establish Grade three (3) pupils' preparedness to read and write in Bemba and English. In Grade 3, pupils were not able to read and write at the desirable level, including some that had supposedly broken through by the end of Grade 2. Pupils faced difficulties in spelling English and iCiBemba words especially when words were raised from simple one-syllable to three-syllable words. Pupils could not write simple sentences that were deemed to be at their grade level. The study concluded those pupils that had not broken through faced most challenges as they had little or nothing at all to transfer from iCiBemba as a first language into English as a second language by the third grade.

A study by Mwambazi (2011), set out to establish the factors and the nature of low reading achievement among grade two pupils in selected schools in Mpika and Mbala Districts. Grade two pupils in the targeted schools were not able to read Zambian languages and English according to their grade level. Some of the factors that led to low reading levels included; absenteeism, shortage of suitable teaching/learning materials, shortage of teachers particularly those trained in PRP methodologies, large classes, poor family and educational background, poor and inadequate infrastructure, pupils not breaking through in grade one, inadequate time allocated for literacy/reading lessons, and unfamiliar language of instruction.

Phiri's (2012) study on teachers' perception on factors which prevent some grade one learners from breaking through to initial literacy, showed that language of instruction to a larger extent was a barrier both to learners and teachers. The situation was more pronounced in urban and in peri-urban schools because of the factor of multilingualism which made it impracticable

to use a regional standard language (Kaonde) as a medium of instruction in New Breakthrough to Literacy. In rural schools on the other hand, language did not pose a threat to the learners because the language of instruction was almost the same as the regional ethnic language. This is why it is important to distinguish 'mother tongue' from familiar language and regional local language of education.

The above point is made poignant in a study by Kumwenda (2011), who sought to establish the initial reading performance in Nyanja in multi-ethnic/ multilingual Chipata urban areas. Specifically, this research sought to find out the reading performance of pupils for whom Nyanja, the regional language of education, is not their first language in comparison with those to whom it is their first language. Findings showed that pupils for whom Nyanja was their first language performed better than those for whom it was not their first language. The analysis of the quantitative data revealed that the difference in performance in reading between the pupils for whom Nyanja was not their first language and those for whom Nyanja was their first language was significant. The finding is echoed in three other studies: Mwanza (2012), Matafwali (2010) and Kalindi (2005). Let us look at these three studies.

Matafwali (2010), observed that even if the use of an official regional language as the initial language of instruction was introduced in 2000, the reading levels of the majority of Zambian children were still low by 2005, especially in Lusaka province. Specifically, she wanted to know how the lack of proficiency in the language of instruction explains difficulties in becoming a conventional reader in a Zambian language and English. Lusaka, the capital city of Zambia is even more multi-ethnic and multilingual than Chipata, the site of Kumwenda's (2011) study. Nyanja as the proclaimed regional language of education and local administration, is described in the literature as the 'mother tongue' or familiar language for the majority of pupils in Lusaka. This is misleading because many languages are spoken in the area. Moreover, the Nyanja used for academic purposes is not exactly the same as the one spoken by the majority of Lusaka residents. It is in this context that Matafwali's (2010) findings demonstrated that lack of proficiency in the initial language of instruction, was the hallmark for poor reading and writing skills observed in the majority of Zambian children. Evidently, the regional language or 'mother tongue' was in reality not so familiar. Thus Matafwali (2010) concludes that when deficits in oral language converge with deficits in cognitive skills, children are at a substantial risk of developing reading difficulties. The argument is that since children in Lusaka District were not proficient in the standard Nyanja recognised in schools, they experienced problems in initial literacy acquisition.

Similarly, Mwanza (2012), conducted a study whose aim was to establish whether the use of standard Nyanja as a sole language of instruction was

appropriate in a cosmopolitan and multilingual environment of Lusaka. Among other findings, the study established that many pupils were not familiar with standard Nyanja and they struggled to learn. Similarly, some teachers although teaching grade one classes, were not familiar with the standard language of instruction. There was a mismatch between the language of play in Lusaka, that is, the urban Nyanja lingua franca, which is the familiar language and the language of instruction, the standard Nyanja. This was compounded further by the fact that teaching materials (books) were written in Cewa as spoken in Malawi or rural parts of Eastern Zambia, which most teachers and pupils could not understand. It was clear that having a 'one jacket fit all' language policy was not suitable for a multilingual and multicultural country like Zambia. It would have been sound to have more than one language of instruction including the local variety of Nyanja in cosmopolitan cities such as Lusaka.

Kalindi (2005), studied reading problems in Bemba of 60 Grade 2 poor readers (identified by teachers) from selected basic schools in Kasama and Mpika urban, Northern province. According to the study, only 13 per cent could read two-syllable words, and only 8 per cent could identify 20 letters of the alphabet. The study showed that even with excellent and intensive instructions in place, some children still failed to make satisfactory progress in reading. It turned out the exclusive use of standard Bemba was a barrier to initial literacy. The variety of Bemba used in multi-ethnic/multilingual classes was not the mother tongue or familiar language to a good number of pupils, and hence they struggled to learn to read and write it.

There is a sense that the misrecognition of the standard language aside, the imposition of zonal languages as official languages of education has negative effects on initial literacy development in communities that speak a different local language from the one officially sanctioned. In this regard, Zimba (2007), set out to establish whether the use of Nyanja was effective as a medium of initial literacy in communities that were predominantly Tumbuka-speaking in Lumezi District. Lumezi District is in the Eastern Province of Zambia in which Nyanja is the zonal/local official language of administration and education. The study revealed that pupils in Lumezi consistently performed below expectation in literacy skills because they could not understand Nyanja which was used to perform classroom tasks. The assumed mutual intelligibility between Tumbuka and Nyanja appeared to have very little impact, if at all, in mediating initial literacy development in Nyanja.

Similarly, Mubanga (2012), who wanted to establish the effect of using Nyanja as a medium of instruction in a predominately Soli speaking area of Lwimba in Chongwe District which falls under the Nyanja language zone, reports that children learnt literacy skills with great difficulties in Nyanja.

Mubanga (2012), concludes that since the pupils in Lwimba area mostly speak Soli they have problems with Nyanja which is the language of initial literacy for the region.

The negative effects of the institutionalised collective misrecognition of the standard official language as described above, are in part a consequence and are compounded by outdated orthographies in use. Banda (2008, unpublished), has lamented the fact that opaque orthographic systems in Zambia and other African countries have also contributed to poor literacy levels in African languages. He gives examples in which familiar sounds and words are made unfamiliar due to faulty writing systems or spelling rules that make children's knowledge of particular languages 'invalid.' The use of familiar language as a medium of instruction in early grades has produced very encouraging results in many countries, especially in Europe. In Finland, for example, the Finnish National Board of Education (2000), conducted a study to find out the factors which contributed to good literacy performance of the Finnish youth. The study established that the 'shallow orthography' of the Finnish language ('what you say is what you write'), gave extra advantage in the initial phase of learning to read (Finnish National Board of Education, 2000: 3). This finding should be good news for Zambia because Zambian languages have a one-to-one correspondence between spelling and pronunciation. This means that once used as a medium of instruction for four years, they would provide the learner with an extra advantage in reading and writing abilities. However, the official Zambian orthography (Ministry of Education, 1977) still contains symbols that are not found in ordinary print, such as newspapers. Banda (2008), blames the orthographies for advocating rules of writing and often times alphabetical symbols that make it unnecessarily difficult for speakers to write in the languages they speak very well. For example, as indicated above, the Nyanja orthography has <l> and <r> as symbols representing distinct sounds or phonemes. Mother tongue speakers mostly use <l> in all situations and a few use the flapped <r> throughout, or in borrowed words. The fact that the standard form distinguishes <l> and <r> means that pupils have to learn new rules in order to write in the language they might know very well.

For Bemba, the orthography stipulates that the velar nasal should be written as <ŋ>. One never finds this symbol in newspapers or official government documentation as <ng'> is the preferred grapheme. In addition, for Bemba, the other problematic area in terms of writing is whether some forms should be written disjunctively or conjunctively ('fused'), and whether the vowels that have been coalesced should be doubled or written as one vowel. Consider the following examples:

umwana uyu > *umwanoyu or umwanooyu* (child this one; this child)
umwanakashi na umwana > *umwanakashi no mwana or umwanakashi nomwana/umwanakashi noomwana* (a woman and a child)

imyaka iyi > *imyakeyi/imyakeeyi* (years these ones; these years)

umwanakashi na ifipe > *umwanakashi ne fipe or nefipe/neefipe* (a woman and luggage)

(Examples from Miti 2012)

The official *Bemba orthography* (Ministry of Education, 1977) states that fused 'word' boundaries, a common feature in the language, in which adjacent 'word-ending' and 'word-beginning' vowels fuse, should be written disjunctively. The problem is that the forms that should be 'fused' in line with the morpho-phonological disposition of agglutinative Bantu languages are prescribed to be written 'unfused.' The orthography appears to confuse what a word is in English, for example, to a word in Bemba. The agglutinative nature of Bantu languages means that what is a word in Bemba may be two or more words in English. Consider the following examples:

Column A: **Unfused**	*Column B:* **Fused Forms (as pronounced by native speakers)**	
Leeta insalu	*Leetensalu*	bring a cloth
Leeta umufwi	*leetomufwi*	bring an arrow
Imbwa iyo	*imbweyo*	there is a dog
Kumya uyu	*kumyoyu*	touch this one
Ukuloba isabi	*ukulobesabi*	to fish with hooks

Adapted from *Zambia (1977: 57)*

Prescribing that the written form should be unfused as in the first column goes against what children already know about the language. In all likelihood, because of the de-familiarisation of knowledge, learners would read the first column as it is. In terms of early literacies, it would be much easier to teach reading and writing as in the second set. To make it even easier, and following the fact that Bantu languages are agglutinative in nature, it would make sense that the forms be written conjunctively.

In short, our argument is that unlike in the Finnish situation described above, the orthographies impede early literacy development because, often 'what you say is not what you write.'

From the preceding sections, it is clear that the language in education policy as premised on a monoglot/monolingual pupil who speaks one particular standard or familiar language, is proving problematic in as far as initial literacy

development is concerned. This kind of monogolot/monolingual perspective is pervasive in the language education literature, but it is inconsistent with the multilingual and hybrid linguistic repertoires available on the ground. Our argument is that there is need to look at the multilingual language practices on the ground, rather than depend on programmes framed in a monolingual/monocultural ideology.

In this regard, we want to argue that Zambia is a multilingual country and linguistic diversity should be at the centre of any policy implementation as well as reading abilities among learners in schools. This entails challenging the status quo and the institutionalised hegemonic existence of language varieties in which local varieties are displaced by zonal languages. The liberalisation of the classroom, especially in as far as initial literacy development is concerned means finding ways of using local languages Therefore, experimentation with urban Nyanja and urban Bemba in Lusaka urban area and parts of the Copperbelt province respectively as a language of initial literacy needs to be encouraged. Such a move would also help counter the language ideology behind the institutionalised collective misrecognition of the standard language, and hence mitigate its negative hegemonic effects, particularly in disadvantaging pupils who have little exposure or no access to the sanctioned language of initial literacy. This entails recognition of local languages in place and/or pupils' multilingual repertoires as legitimate languages and resources in initial literacy development. It might be necessary to describe and document such varieties so that learning and teaching materials could be produced, and teachers trained to use these urban varieties in class.

Translanguaging as Classroom Practices in Multilingual Contexts

There is need to consider using multiple languages including hybrid forms in classroom practice. This could involve what is called *translanguaging*, which in its original conceptualisation is defined as, 'the purposeful pedagogical alternation of languages in spoken and written, receptive and productive modes' (Hornberger and Link, 2012: 262, see also Baker, 2003, 2011; Williams, 1994). The basic tenet of translanguaging as a classroom practice is to engender multilingual and multimodal literacies. As Garcia (2009: 44) notes, translanguaging is about 'engaging in bilingual or multilingual discourse practices [and] not on languages as has often been the case, but on the practices of bilinguals that are readily observable'. Whereas standard Nyanja or Bemba may, for example, work in some homogeneous groups in some remote areas of Katete and Chadiza or Kasama, Mansa and Samfya, in most parts of urbanised Zambia where heterogeneity and multilingualism

and multiculturalism is the norm, the notion of home language or familiar language, in the singular, becomes fuzzy and inoperable as children use home languages or familiar languages. This means, proclamations which champion home language or familiar language, are misplaced for not accounting for pupils' multilingual linguistic behaviour. This may in part explain why initial literacy development initiatives through a singular mother tongue or familiar language have not yielded the desired results. It is time to consider alternative models, especially those which focus on production and consumption multilingual discourses in the classroom. In the translanguaging model, for example, the teacher may teach in standard Nyanja and/or English, while pupils may respond or do their discussions in different language varieties. This would enable the learners to participate fully in the classroom and at the same time get exposed to the different language varieties including the standard ones (Banda, 2010).

One question that comes to mind is whether translanguaging is not a different reincarnation of code-switching. In justifying why translanguaging should be seen as a new approach, Hornberger and Link (2012: 263), contend that research on code-switching 'tended to focus on issues of language interference, transfer or borrowing' while 'translanguaging 'shifts the lens from cross-linguistic influence' to how multilinguals 'intermingle linguistic features that have hereto been administratively or linguistically assigned to a particular language or language variety' (Garcia, 2009: 51).' In addition, translanguaging is multimodal and, thus, widens the research possibilities in that it transcends verbal communication (both spoken and written language) to other mediated and mediatised modes and related literacies pupils bring to the classroom. Zambian children, in both urban and rural areas, have been exposed or are incrementally being introduced to new technologies such as cell phones and other computerised gadgetry. In viewing linguistic and other social semiotic knowledge Zambian pupils bring to the classroom, 'how researchers and educators alike might better understand the language and literacy practices of those they study and teach' (Hornberger and Link, 2012: 263-4). Banda (2010) and Blackledge and Creese (2010), argue that alternative bilingual models of classroom practice such as translanguaging can help the pupils, families and educators alike, to mitigate and counteract the negative effects of monolingual language ideologies and policies as well as bridge home and school multilingual literacy practices and identities.

Conclusion

The paper has examined not only the genesis of language education policy that favours English, but has also analysed a plethora of issues that have

connived to impede progress in literacy development, especially reading and writing among Zambian learners.

Three phases have been identified in the introduction and subsequent entrenchment of English as a language of education, and also of commerce and official government business. First, there were the missionary societies which taught using African languages, but also taught some English to the very few 'gifted' Africans to help mostly in the translation and transcription of English verses and scriptures into local languages which were used in evangelical work. The second phase came with the British South Africa Company (BSAC), who ruled on behalf of the British government, British farmers, hunters, miners and other fortune seekers. The poor education offered by missionaries using Africans led to demands by these groups for better education for Africans to cater for the growing demand for clerical and other administration jobs in the private sector, government and the mines. These positions required contact with the majority who did not speak African languages, hence the need for Africans who spoke some English. Thus, pressure was put on mission schools to include more English in their curriculum, especially after initial literacy in the mother tongue. Since formal education for Africans ended after 2 or 3 years, the few Africans that endured more than 3 years of education had the added bonus of some English education, enabling some of them to qualify for 'lucrative' jobs as translators/interpreters and hence mediators between the white 'boss' and the African majority. There is no doubt that their knowledge of English, however little, enabled them to claim and acquire a different and higher status in their communities.

The third phase came with the onset of the emergent new African nation-state, Zambia. The emergent Zambian leaders went further than the colonial government and its agents, and proclaimed English the *de facto* language of official business and of education starting from Grade 1. The various subsequent education reforms have often endorsed the position of English directly or indirectly. As already discussed above, the recent directive in which Zambian languages are supposed to be used for four years of initial literacies and thereafter switch to English, does not help the cause of Zambian languages. Since it is a transitional model, it only postpones the problem and, in fact, helps to whet the appetite for English. Second, those children whose parents have the means will go to private schools or home-schooling in English. This group of elite children will have a head start when the transition to English occurs for the majority of Zambian children. These elite children will also not experience the academic trauma of switching medium of instruction from one language to another. Hence, our earlier argument for multilingual models of language

education which takes into account both the demand for English education by parents generally and the need for Zambian languages should also be at the centre of a Zambian child's education and cultural heritage (cf. Banda, 2010 for similar arguments). This means, for a language education policy, which accounts for local languages such as Soli and Tumbuka in Chongwe and Lumezi respectively, for example, in addition to the regional language Nyanja and English. In addition to enhancing chances of literacy development, this would provide greater opportunities for the democratisation of the classroom, observation of language rights and inclusiveness as well as facilitation of individual and societal multilingualism, and hence socio-economic mobility of Zambian society at large in an increasingly globalised world.

Haugen's model of language standardisation has been to background Bourdieu's notions of *symbolic violence* and misrecognition of the standard language as the sole legitimate language of official business and education, to discuss how outdated orthographies and use of regional language have impaired initial literacy development in the multilingual contexts of Zambia. In turn, a discussion ensued to show how Zambia's multilingual and multicultural heritage could be enhanced through multilingual approaches to classroom practice. In the process, it was noted that translanguaging, with its focus on the multilingual discourse practices in classrooms, offers pedagogical possibilities to counter the monolingual ideologies and policies in place and hegemonic negative effects of the valorisation of the misrecognised standard varieties of Zambian languages as the legitimate languages of initial literacy development.

It can, therefore, be said that given the multilingual contexts as described in this chapter, Zambia requires a different model to the one handed down from the colonial era in which one language is used for teaching and learning at a time. There is need to think of models in which Zambian languages and English are used side-by-side as equal partners in the teaching and learning of content right from Grade 1. In this regard, both the mother tongue only and the English only language education policies are misplaced in the multilingual contexts of Zambia.

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CHAPTER 9

A Reading Culture in Zambia: An Alternative Explanation of its Absence

John Rodrick Luangala

Abstract

This article dwells on the subject of the perceived absence of a reading culture in Zambia. It poses two arguments mainly. The first is that the definition of culture commonly adopted by Zambians when debating this issue is just too narrow, as it focuses exclusively on leisure alone, leaving out other aspects like survival strategies. The second is that, consequently, both the explanation of the causes and the prescription of the remedy are inadequate. In attempting to elaborate on the first argument, the article suggests indices consisting of some commonly used survival strategies by which the presence, or extent, of a reading culture in a society may be gauged. In attempting to suggest an alternative explanation of the cause of the absence of a reading culture in Zambia, the article appeals to two theories: the one by Vygotsky on the ontogenetic and phylogenetic development of meta-cognitive faculties, and the neo-Darwinian evolutionist theory on the origins of humankind. It justifies the need to promote a reading culture in terms of the demands of the evolving global culture requiring the Zambian society to acquire new modes of thinking and new survival strategies. As one way to quicken the advent of a reading culture in the country, the article suggests intervening in socialisation processes through early childhood education.

Introduction

At various fora in Zambia, people have expressed concern about the perceived absence of a reading culture in the Zambian society. For evidence of such an absence, they often point to the casual observation that very rarely does

anyone see anyone reading anything just for the sheer joy of reading. The advent of television, video, and video games is often blamed for the young not taking to reading for joy, whereas beer is thought to have made reading the last alternative habit for the adults. The dearth of good reading materials in book shops and libraries, the high inflation, the resulting poverty, and the falling literacy rates; all these are cited as other major causes of the absence of a reading culture. Two measures are often suggested as the remedy; improve literacy levels by providing free basic education for all, and stock our bookshops and libraries with affordable interesting literature, meaning storybooks. This article takes the view that while the concern is genuine, the explanation of the phenomenon is inadequate. In countries like England where a reading culture is well developed, television is more interesting to watch than in Zambia, and there is a better variety of video games. There is also a wider range of alcoholic drinks, and the English simply love their draught lagers. Casual observation also shows that even among the highly literate Zambians very few read for the sheer joy of it. So, the explanation for the absence of a reading culture in Zambia had better be sought somewhere else. This article proposes the low level of cognitive development the Zambian society as a species has attained so far as the major explanation.

Definitions

In discussing the absence of a reading culture in Zambia, a consensus is needed on the meaning of the very term reading culture. As a psycho-linguistic term, reading refers to either the process or the act of decoding information from a written text by interpreting conventional graphing symbols. Anthropologists commonly define the term culture as the totality of a people's way of life. In this article, therefore, by a reading culture is meant a people's way of life in which reading is the key survival strategy; i.e. a way of life in which people use conventional graphic symbols to make sense of a situation, to frame it, and to control themselves in acting on it. Our conception of a reading culture, therefore, should not be restricted to leisure alone, a constituent element; it should instead reflect the totality of a way of life as implied in the word culture.

The Zambian Society

It is acknowledged here that the Zambian society is not homogeneous; it consists of people originating from different socio-cultural backgrounds both on the continent and overseas. It is, therefore, prudent that by the Zambian society we should mean the main group of indigenous people who are African in origin, particularly sub-Saharan. This means that what we can say here about the Zambian society may also apply to those other societies in the

sub-Saharan region; we share so many commonalities. It is being suggested here that there is no reading culture in the Zambian society just as it may not be there in the larger sub-Saharan one, and the reason is that this species of human beings has not as yet cognitively advanced to the level where individual members use conventional graphic symbols to regulate themselves in acting on the environment as a survival strategy. So, the Zambian society will here be regarded as a homogeneous species only in so far as it is a sub-set of the major sub-Saharan one.

Indices

In a society where a reading culture has not fully developed, there are certain behavioural patterns that will be observed. These patterns relate to how people use or fail to use graphic symbols, particularly the written word, as a means of regulating themselves as they get on in life. Examples abound.

Diary

In societies with a reading culture, people use a diary to regulate themselves in performing everyday roles. Diary entries are meant to show what one is required to do on which day and date, at what time, where and with whom. For many educated Zambians, memory is what works in place of the diary. Even those whose official position entitles them to a copy of a diary, most of them will depend on their secretary to remind them about an important appointment; their diary will remain blank throughout the year.

Road Maps

In a society with a reading culture, road maps are easily available and on high demand. For example, in the United Kingdom, one cannot go around places without a map, and the local people express surprise if one tries to ask one's way to sites. They always advise one to buy a map. In a society without such a culture, maps are rarely found. Instead, people use the word of mouth to find their way to some places, i.e., simply by asking around. In Zambia, only large-scale tour operators and a few others in the hospitality industry stock maps for their clients.

Manual

Almost all electrical gadgets come with a manual. But very rarely will individuals in a society without a reading culture use such literature to find out for themselves how to install, operate, or repair a minor fault on the equipment. The tendency is often to invite a neighbour who has something similar to come over and advise, or to just do guess work.

The Will

A will is a piece of literature aimed to regulate the handling of property after the original owner has died. There has been a very vigorous campaign in Zambia for propertied adults to write and leave a will, but with very little success. Many reasons may be cited for Zambians resisting writing a will, and one of them is the absence of a literate culture, one where people have faith in the written word. This may also explain the fact that many Zambians will revere what the deceased said orally on the deathbed, and yet will be very ready to tear up the written will.

Packaged Food Labels

In societies with a reading culture, all factory packed food has to be labelled and all ingredients and their proportions have to be shown, together with the physical address of the manufacturer. People from literate societies would shun packaged food that is not labelled. In Zambia, however, people rarely care to read such labels, and so they are ready to buy even those factory foodstuffs without any labels, provided they are easily recognisable as food. In other words, just sight suffices.

Contract

A written contract is another piece of literature that aims to regulate the behaviour of the parties involved, by stipulating such things as rights, privileges, obligations, etc. It is very common for people in a society without a reading culture to sign a contract without fully understanding what it entails. Such people do not even take a contract seriously, and so the may easily go against it in the light of some painful concrete experience. For them, concrete experience has more influence on their decision than the rational thought that should be assumed to precede the signing of any contract. And so, an organisation may commit itself in writing to doing something in a specified way, but then change course, or just ignore the commitment, upon certain concrete experience. This is one of the reasons why very few governments in sub-Saharan Africa respect their constitutions. It is also for this reason that such governments may sign a convention, fail to honour it in deed, and show no qualms about it.

Advertising

In a society without a reading culture, there is heavy dependence on the word of mouth in selling and buying things, particularly among the mass of people

in high density areas some of whom may be sufficiently literate. People tend to depend on neighbours, friends and relatives to tell them where they can buy what or to announce to others that they are selling this or that. Very rarely do people in such a society write or read advertisements; the word of mouth suffices as the strategy.

The watch

A watch is another gadget useful for regulating one's behaviour in terms of time keeping. For many people in a society without a reading culture, a wristwatch might as well be regarded merely as a decoration on oneself and not an instrument for self-regulation. And so it is very common to see such people wearing a wristwatch but reporting late for an important event whose time of commencement they had been told in advance.

Menus

In a society without a reading culture, it is very common to find in many restaurants menus that are out of date, i.e., the food indicated may not be available at all anymore. A new restaurant may design menus prior to opening, but with time chefs stop following them and customers switch to asking orally what is available in order to decide what to buy. More often than not, only those restaurants owned by foreign companies or individuals and where visitors from developed countries are also expected tend to be consistent in displaying up-to-date menus. In bars, Zambians are more likely to ask the price of beer even when a price-list is clearly visibly displayed behind the bar attendant.

Shopping List

A shopping list is a piece of literature intended to guide one's selection of what to pick from shop-shelves, and one common characteristic typical of Zambians is failure to stick to it. When a Zambian has selected every item on the list, he rarely can resist adding one or two more others that were not on it, provided he has seen them. A Zambian's shopping basket will often contain a mixture of what was budgeted for earlier and what was selected on the spur of the moment. Given financial constraints, it is quite common for a Zambian to drop what was budgeted for earlier in preference for what has just been found available. This tendency may also be observed among Zambians charged with drawing up budgets and controlling expenditure in both small enterprises and larger ones, like government. Concrete objects or phenomena freshly seen or experienced tend to have a much more immediate

appeal to our attention than those earlier planned for or anticipated but only indicated on a piece of paper.

Scientific Mind

In a society with a reading culture, people have a scientific mind in the sense that they think by rationalising. In a non-literate culture, however, people think by remembering, as pointed out by Vygotsky (see Luria, 1976). For example, one with a scientific mind may predict the occurrence of a phenomenon on the basis of factors leading to it. But one without it may just rely on memory; something will happen because it always happens at this time. To combat the AIDS pandemic, health practitioners circulate information describing what type of behaviour may lead to one acquiring it, and how; they try to appeal to people's rational thinking. But people without a scientific mind, do not think rationally; instead, they depend on memory, and since AIDS has never occurred to them particularly before, either they conclude it can never happen to them or just do not think about it at all. This may explain the fact that even medical practitioners who are supposed to know better are victims of the pandemic.

In discussing possible reasons why Africans have lagged behind in terms of economic development, Professor Ali Mazrui remarks in one of his programmes on BBC that: we have adopted modern institutions and acquired modern tastes, but we have not acquired the rational thought that goes with them. In stressing the folly of such an action, he quotes two lines from Alexander Pope, an English poet who says:

> *A little learning is a dangerous thing:*
> *Drink deep, or taste not the Western spring:*

But the other two lines that immediately follow the above are also relevant in our context here, and they run as follows:

> *There shallow draughts intoxicate the brain,*
> *and drinking largely sobers us again.*

In other words, hesitant adoption of modernity through shallow education may only confuse us; we just have to go all the way and 'drink largely' the new knowledge generally associated with rationality.

All the above are some of the characteristics of a society without a reading culture; they point towards the low level of cognitive development attained by the species as a whole. To put it bluntly, we do not have a reading culture in Zambia as yet because cognitively we are still at the object-regulation stage; in other words, we are still primitive.

Theories

The above are some the characteristics of a society without a reading culture. This article is suggesting that they point towards the low level of cognitive development that Zambians collectively as a species have attained so far. In posting this argument, the article appeals to two theoretical assumptions; Vygotsky's, that the development of meta-cognitive faculties in an individual occurs in three successive stages; and evolutionists', that ontogeny recapitulates phylogeny. Let us look closely at each one of them.

Vygotsky's Theory

There is a lot of literature on Vygotsky's theory on the development of meta-cognitive faculties in an individual human: e.g., Vygotsky (1962,1978), Leontiev (1983), Vocate (1987), Sokolov (1972) Pellegrini (1984), Luria (1976), Wertsch (1979a),1983), Frawley and Lantaolf (1985), and Luangala (1996).

Cognition means thinking; a conscious mental activity voluntarily carried out in order to get beyond the information given (Bruner, 1973). Meta-cognition means deliberate mental control of the thinking process; i.e., cognition on cognition or cognitive control of the self. So for example, deciding what food to buy is a cognitive activity, reading the mean is a meta-cognitive one aimed at guiding the process of deciding. Again, figuring out whether or not to start off for an appointment is a cognitive activity, looking at the watch is a meta-cognitive one aimed at guiding the process of deciding. Remembering the obligations contained in a contract, or a convention; is a cognitive activity, reading the papers one signed is a meta-cognitive one aimed at aiding the remembering process.

Vygotsky used the term regulation to refer to mental control. He believed that meta-cognitive abilities in an individual are acquired through socialisation, a process which he said involves that individual going through the following stages: object-regulation, other regulation, and self-regulation. For example, as an infant, an individual has no free will and therefore no control of his own attention. What attracts and controls his attention are the objects around him; those that he sees, hears and touches. At that stage, that person is said to be object-regulated. As he grows up, physically and mentally, the child begins to be controlled by older peers and the adults around him; they direct his attention. He can perform some of the tasks that involve thinking, but he usually needs assistance in terms of how to conduct that thinking strategically. For example, an adult may advise a child to keep watching the clock to ensure the child is not late for school. In a puzzle-copying task in a study by Wertsch (1979a), an adult was heard advising a child as follows:

> Now look at the model to see what comes next… Try
> the red piece her (Frawley and Lantolf 1985: 21).

At this stage, the child is said to be in a state of other regulation. As the child confronts a similar task by himself, it is noticed that he repeats aloud to himself the sort of advice that older peers and adults gave him on previous occasions, an activity that Piaget called egocentric speech. Piaget said such speech wears out with maturation. Vygotsky argued that this is the origin of reasoning, and that this speech does not wear out with age, but that it retreats inwards to form verbal thought. An individual who has reached such a stage is said to be in a state of self-regulation, the third and final stage.

Two points need stressing from the foregoing. First, the development of meta-cognitive abilities occurs in three stages; object-regulation, other-regulation and self-regulation. Second, each society is responsible for conducting each individual member through all these stages as part of the socialisation process. A suggestion could be made here now that a society that has not yet attained a state of self-regulation cannot be expected to be able to bring up individuals to that state.

Evolutionist theory

There is a well-known theory in anthropology saying that the human race evolved from an ape, that the demands of our environments have 'urged' us to change physically and mentally, and that the nature and intensity of such demands are responsible for various human communities having reached differing levels of intellectual development. Cross-cultural psychology is the sub-discipline where such issues are investigated and debated (see Berry and Dasen, 1974; or Price-Williams (1962, 1966 and 1969). It is also believed that cultural differences may explain cognitive differences among human communities (see Spencer, 1852; Tylor, 1958 and Morgan, 1891) although it is not unanimously agreed as to which one is the cause and which one is the effect, as Cole *et. al.*, (1971) point out. In other words, concrete objective elements of a culture tend to mirror the level of intellectual development the community has attained. It is assumed here that reading as a habit is also a concrete objective element of a culture, and we are addressing the concern that it is absent in Zambia.

Corollary and key here is also the belief that the mental and physical development of an individual of a species (ontogeny) recapitulates (i.e., follows the same pattern as) that of the entire species (phylogeny). Thus for example, at some point in his growing up, an infant crawls on all four, just as good as human beings used to walk on all four once upon a time as apes. Similarly, a species of human beings will develop from the state of object-regulation to that of self-regulation, just as an individual member of the species is expected to. It is in light of this that it is assumed in cross-cultural psychology that culture may have a determining effect on cognitive development; determining in both senses of influencing the direction and

the pace, and limiting the scope and depth or extent. In other words, a child growing up in a community that has gone only as far as the state of other-regulation might not be expected to go beyond that and attain the state of self-regulation. To bring the argument home, if the Zambian society has not yet intellectually developed to the level where reading would be the main strategy for getting along in life, it should hardly be surprising that individual members of this society have not yet taken on reading as the main strategy to survive,i.e., reading is not yet part of our culture because we have not yet,as a species, attained the relevant intellectual level,or to put it bluntly, we are still primitive. We are still vacillating between object-regulation and other-regulation. That is why as a nation we base our decisions on concrete experience (object-regulation), and on advice from others economically advanced (other-regulation). Devoid of our rational thought (self-regulation), the conflict between the former two (concrete experience versus advice) intoxicates our brain; and so we go round and round in circles.

The theories reviewed agree that culture, through socialisation, plays a big role in determining the direction, the pace, and the extent of cognitive development, as just stated above. This is in fact what Bruner (1974:37) has in mind when he says:

> Intelligence is to a great extent the internalisation of 'tools' provided by a given culture. Thus, 'culture-free' means 'intelligence-free'.

Somewhere else in the book, he elaborates as follows:

> It is characteristic of human beings that we carry out this vicarious action (thinking) with the aid of a large number of intellectual prosthetic devices that are, so to speak, tools provided by the culture. (*ibid*.,20).

The argument that different cultures promote varying modes of thinking is found in much of the literature in cross-cultural psychology. For example, Serpell (1976: 70) argues as follows:

> Theories of the central type have suggested reasons why different cultures might promote modes of thinking which lie at different points on the continua of concrete-abstract, magical-rational, emotive-cognitive.

The suggestion in this article is that Zambian cultures, like most of those in Sub-Saharan African, tend to promote modes of thinking closer to the concrete, magical, and emotive ends of the continua: *concrete*, meaning dependence on concrete experience to decide; *magical*, meaning the tendency to explain

phenomena in terms of myths and taboos; and *emotive*, meaning the tendency to feel more strongly and even to act on the feelings without having to first calculate carefully. Comfortable survival in the evolving global village, one so dependent on the ever new and advanced technology, makes it simply imperative for Zambians to promote literacy in general and a reading culture in particular. Not only do literacy and a reading culture offer the most efficient method of spreading and obtaining knowledge and information, on which strategic action solely depends, but also they are believed to be implicated in changing modes of thinking more towards the abstract, rational and cognitive ends of the continua. These are the ones that give some cultures in this global village incomparable advantage, rendering them better able to dominate others in every sphere of this competitive life. But in addition to promoting a reading culture, we also need to adopt socialisation styles believed to contribute to the development of such modes of thinking.

Conclusion

Research is needed to reveal the way the young in Zambian homes are socialised. The sort of socialisation processed that feeds into meta-cognitive development is typically that as occurs in dialogues between a child and a caregiver. The dialogue cited by Frawley and Lantolf quoted above illustrates how dialogue in a context of joint activity and joint attention may facilitate the provision of these vital thinking strategies to a child, the prosthetic tools. Casual observation shows that Zambian adults, particularly among relatively poor and illiterate communities, rarely engage in such dialogue at a certain crucial age of the child as may impart rational thinking strategies. It also reveals that, even when they do engage in some dialogue, they tend to explain phenomena to children in terms of myths and taboos, and that quite often they regard children's 'why-how' questions as sheer impertinence. This tendency may have the effect of nipping in the bud the very psychology stems that should have sprouted into abstract, rational and cognitive modes of thinking. A typical Zambian teaches the young by showing and not by explaining. My colleague and I have developed a hunch that socialisation, defined here as the process of passing on cognitive strategies and styles to the young, may be responsible for girl children in Zambia generally performing poorly in Mathematics, one subject that demands concentrated logical thinking. The need to investigate this is urgent.

Tentatively, this article proposes socialisation as responsible for the absence of a reading culture in Zambia, generally. It urges as a solution for government and civil society to intervene in the socialisation process of the Zambian young, and this can only be done through universal early childhood education; let us demand nursery school for every toddler. It will be a very

expensive undertaking, admittedly; but we do not seem to have any choice at all. We simply have to drink deep, and to be able to do so we just have to invest deep; one might simply say here:

> A little spending is rather a futile recourse;
> Invest deep, or waste not the national resource.

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CHAPTER 10

Rural-Urban Shift in Zambia and Ireland; A Comparative Analysis of Conformity to Classical Sociological Thought

Jack Chola Bwalya

Abstract

It has been claimed that the characteristic way of life of a given group of people in a specific geographical part of the world, is normally unique to that given area. This article explores rural-urban migration, and the causes and impacts of rural-urban migration in one particular region of the world is different to that of another part of the world. However, classical sociological narratives have argued that some of the sociological impacts of these trends transcend regional and specific experiences. Using Zambia and Ireland as case studies, this article argues that comparatively, some of the classical sociological theories on the impacts of the rural-urban shift conforms to sociological accounts while others are found to be unique to the experiences of rural-urban shifts specific to Zambia and Ireland.

Keywords: Sociological thought, Rural-urban migration, Zambia, Ireland

Introduction

This paper presents a classical theoretical comparative analysis on the historical legacies of the causes and effects of rural-urban migration in two former British colonies, Zambia and Ireland, and how they conform to classical sociological thoughts on rural-urban shift. The paper is structured as follows, following firstly; a cursory theoretical analysis of some of the classical sociological literature on the rural-urban migration shift, a brief historical description of rural-urban migration during and a few decades after the British colonial rule

in both countries is given, highlighting its causes and effects firstly from a Zambia perspective; and then following that up with an account of the Irish model.

Secondly, having looked at the two cases, a comparison and contrast of the causes and effects between the two countries is outlined, and then, a conclusion is given to both arguments. Thirdly, arguments are outlined on whether the effects of rural-urban migration from the two case studies conform to the discourses on the rural-urban shift in classical sociological narratives explored in this paper.

Classical Sociological Narratives on the Rural-Urban Migration Theory

Debating some of the arguments about classical sociological narratives on the theory and thinking of rural-urban migration draws heavily on the writing of sociologists such as Tonnies, Durkheim, Simmel and Bourdieu, to mention but a few. These scholars were all concerned about the impact of urbanisation on the social relations of the people as a result of a shift from the rural to the urban areas. Tonnies and Simmel, for example, were concerned that as people moved from the rural to the urban areas, there would be an eradication, loosening and also weakening of the everyday social interactions among people, and this would lead to the breakdown in the social relationship due to the complex ways of life in the urban areas, and that if this happened it would finally lead to the loss of a sense of community life.

Tonnies in his book *Community and Civil Society* (1887, [2001]), gave a distinction between life in rural and urban areas, and argued that rural life was more cohesive, in which very strong personal relationships were part and parcel of community lifestyles based on traditional social rules passed down from posterity. He further argued that as a result of a special bond among the peoples of the rural areas, their lifestyles were simplified. For example, he maintained that it was easy to have face to face interactions among the rural dwellers as it was not determined by the economic aspect of an individual or their social class status, unlike in the urban centres where economic factors and one's societal standing played a deciding role.

He narrated further that, in contrast to the life in the rural areas, the urban posed a real threat to the social cohesiveness of lifestyles for the rural dwellers living in urban dwellings. He contends that, unlike the lifestyle in the rural community where there is a strong relation among its peoples, the rational of self-interests of the urban lifestyles broke down the traditional bonds of family and kinship. He asserted, for example, that interactions among people in the urban areas were based more on an impersonal and indirect basis, created as a result of political and economic considerations. Thus this alienated and broke down traditional cohesiveness and values of the rural dwellings.

Simmel in his book *The Metropolis and Mental Life* (1903, [1950]), was, however, concerned about the psychological impacts of the transition from a rural agrarian community to the modern urban industrialised areas and how this would affect one's mental status when exposed to the everyday rigors of urban life. He argues that the everyday social interactions in the rural areas revolved around the close emotional relationships and that the coming of urbanisation broke down the established social bonds as a result of the intensification of lifestyles in the urban setting as the individual focus moved to self-survival rather than community interdependence. He contends further that rather than the normal communal bonds of the rural life, the urban social interactions were purely based on a mechanical level, and that people mingled together entirely based on common economic interests and thus their associations were not bound by close emotional relations.

To sum up, Tonnies' arguments in actual sense saw the rural-urban shift as the way where the rural would be taken over or destroyed by the new urban, hence he feared that the long-held traditions of the old order would be displaced with the coming of urbanisation. Simmel meanwhile feared that the mental status of life in urban areas would be hard to cope with for the rural dwellers and that their psychological makeup would be distorted.

Contrarily, however, to Tonnies and Simmel's assertions about the effects of rural-urban migration on the community's social lifestyles, Durkheim, one of the grandee of sociological thought asserts that when the rural society had been replaced by an urban setting or that when people migrated to the urban centers, their traditional values and beliefs which were uniting forces, did not completely disappear (cited in Giddens 1971: 71). Durkheim argued that the collective social order of those rural migrants in the urban centers 'had not been ceased to a society'' but that it continued and preserved a 'collective unity and identity'. In Giddens' *Sociology* (2006: 108), Durkheim, further, contends that even though 'social facts' might have constrained 'what we do', they did not determine 'what we do'. His assertion was that even when people migrated to urban areas, their beliefs and traditional makeup were not altered as a result of the unfamiliar factors with which the city life exposed them to. The communal values and norms, he asserted, were some of the requirements with which markets in the urban centres needed in order for them to function perfectly. Durkheim (1960), notes that the role of the division of labour altered the kind of social ties people were exposed to when in urban centres. He further adds that, in the rural areas people were united by their common beliefs and values; and concluded that in the city, it did not just diminish but took a different form and people got united through 'collective conscience' as a result of different forces with which the urban exposed people to in urban areas.

Robinson (2006: 9), concurs with Durkheim's assertion and contends that, when rural migrants arrived in the urban centres, they did not only retain their social relationships but also 'engaged with the difficulties and openings that cities presented in a number of different ways', and thus helps them establish new relationships and engage in interactions with people with whom they came in touch with.

Furthermore, Bourdieu also concurs with Durkheim's claims that people would get adapted to new settings in the urban areas and would also maintain their traditional social values. For example, Bourdieu (1990), during his ethnographic studies in Algeria, wrote in an article about the Kabyle peoples, stating that their social norms and traditions which were part and parcel of their rural lifestyles were still maintained when they had migrated to the urban areas to seek work and permanent settlements. He further recounted that even when the Kabyle peoples had migrated to the modern industrial areas of the urban areas, their traditional sexual hierarchies which gave traditional station to both men and women, and prescribed particular positions and duties which were embedded in their customs were kept and adhered to while in the urban hubs. Bourdieu (1992), adds further that the Kabyle's long held rural traditional ideas and beliefs about masculinity which separated men from women, and also gave them different chores in their communities, where still rife among them even though they had migrated from their traditional rural villages and were now residing in the modern industrial communities of the urban areas. Bourdieu, for example, narrated that the Kabyle women while in the urban areas were still confined to their circumscribed domestic chores and thus reinforced their customary way of life.

In summary, it is evident that Tonnies and Simmel feared for the disappearance of the established rural way of lifestyles when rural migrants were exposed to the rigors of urban lifestyle because they thought that, the new urban dwellers would abandon the rural customs, values and beliefs which were a part of their social relations and interactions they lived with in the rural areas. Durkheim and Bourdieu, however, believed contrary to Tonnies and Simmel's assertions and argued that the urban atmosphere did not consume the traditional values with which people arrived with from the rural areas, but that they retained them as they got familiar with the new urban values, ways of interaction and the formations of social relationships in the urban areas.

Case study 1: **Zambia**

This section will briefly give known causes and effects of rural-urban migration in Zambia during the British colonial rule and the early years following decolonisation and Zambia's independence in 1964.

Rural-Urban Migration in Zambia: Causes and Effects During and after a Few Decades of British Colonial Rule

During Colonial Rule and Governance

It has long been argued that Zambia's history of rural-urban migration is long and embedded with political, economic and social issues which have its origins attached to the periods of the British Colonial rule.

Vail (1983), states that before the establishment of governance by the British Colonial Office, the British South Africa Company (BSA) which owned the majority of the copper mines in Zambia, misgoverned Zambia through a variety of tactics and methods which were all designed to encourage labour migration from the rural areas to the mines of Northern Rhodesia's (Zambia) own Copperbelt province.

The methods by which such migration was encouraged was purely based on preventing alternatives to wage labour (Cliggett, 1997), and the techniques used included 'outlawing traditional subsistence systems and cash cropping, and enforcing hut taxes'. If it hadn't been for such severe attacks on people's livelihoods in the rural communities (Cliggett, 1997) contends further that, men might have found other alternatives for earning wages, even with the increasing taxation, and would have attempted to remain in their native homes. Therefore, as a result of such harsh conditions imposed on the rural dwellers, leaving their home rural communities was not an option which men chose with pleasure; but was simply how everyone coped with the given circumstances.

Colonial Copper Mines in Northern Rhodesia: adapted: google.ie/mines in Zambia

Colonial Copper Mines in Northern Rhodesia
www.exploringafrica.matrix.msu.edu

The conditions for the migrants were not that rosy either as the British Colonial government provided very little services in order to improve the experiences of the migrants in the urban areas (Seleti, 1992). After a while, they did, however, see an increased awareness of social issues in the rural communities, and this then led them to start investing in rural communities. They provided facilities such as health services and offered and granted the facilitation of missionary education. The provision of such services were born of the ideas which were rife among the colonial masters, that the rural areas were the perfect and rightful long-term homes for the labour migrants and their families. Permanent relocation of rural families was not desired and even working men were only temporary migrants to employment centres, thus willingly and actively separating families.

Through the provision of missionary education and health services in the rural areas, the colonial government achieved their priority of making sure that the migrants kept all their families back in their 'rightful' dwellings in the rural areas, thereby achieving a labour migratory system of only temporary residence for the men in urban mining centres, which came with some regular monthly visits to their rural homes, and a small package of retirement to their

village at the end of their employment. This system was designed so that the colonial government and their mining industry could have no responsibility of looking after the men once retired or not needed for work (Seleti, 1992; see also Gewald *et al.,* 2011 for an in-depth analysis of politics in late colonial Zambia).

Parpart (1986), concluded that the British colonial establishment had put into place a well thought out plan and devised a system whereby:

> Male migrant labourers were temporary town dwellers, in town solely for employment, while maintaining their real home in the village. Residence and housing were restricted to specific areas of town, and except in mining compounds where married women were permitted to live with their husbands, town living was solely for men only.

Decolonisation and Zambia's Independence

The period following the end of the British Colonial rule and the independence of Zambia uttered colonial era migratory systems. Chilivumbo (1985), asserts that the long-held perceptions of rural-urban migration as the male only phenomena designated for them to work in the mines, changed. At the time of independence in 1964, Zambia had lifted the old colonial restrictions, and all the people could now freely move to and from towns, and more importantly, they could find better and more permanent employment, as well as establish long-term households in the urban areas.

Chilivumbo further notes that, even though people had been given the freedom to move freely to the urban areas, they still maintained family ties and returned to their rural roots after retirement in the urban area.

Ogura (1991), for instance, citing data from the 1970s and 1980s adds further that, while rural-urban migration might have decreased during that period in Zambia, urban-rural migrants at the end of their employment were a must whereby the retirees returned to their home villages to settle, and thus maintained some kind of a link with their home rural communities. Schuster (1987), further asserts on the importance of maintaining links with the rural areas, that as long as poverty persisted in the countryside, 'kinship links' would remain an important part of both urban and rural residents lives as strategies of survival, comfort and security when they the retired from the urban employment.

The huge wage differences between the rural and urban areas and farmland scarcity had in post-colonial Zambia been attributed to as some of the major drivers of rural-urban migration. A national household budget survey conducted by the Central Statistical Office in 1974/5, for example, found

substantial inequalities between the rural and urban incomes. Urban wages were found to be 3.5 times higher than those in rural areas. Heilsler, (1974) also found that the massive differences in wage and overall living conditions between the rural and urban dwellers contributed greatly to rural to urban migration during the early years of post- colonial Zambia.

The non-availability of farmlands for the people living in the rural Zambezi river banks, which were fragile and flood-prone areas, for example, had also been attributed to as one of the causes of migration. The Central Statistical Office (1995), found that a large proportion of people from this region migrated to the urban areas to seek work during the rainy season floods when the availability of fertile land was limited and returned in the dry season.

In conclusion, it is evident then, based on the arguments above, that rural-urban migration in Zambia was male dominated, and they mainly migrated to work in the mines during the British colonisation and governance periods. After independence, in 1964, the non-male restrictions on migration were lifted and everybody was free to migrate to the urban centres in quest of a better job and sound living conditions. Wage differences between the rural and urban places, and the limited availability of farmland in flood-prone areas have also been mentioned as some of the causes of rural-urban migration during the early years of post-colonial Zambia.

Effects of Rural-Urban Migration in Zambia

Urbanisation

One of the major impacts of rural-urban migration in Zambia had been the unplanned and uncontrolled urbanisation which accelerated from 18 per cent in the 1960s to an alarming 34 per cent in the 1990s (Guest, 2003). This had mainly been due to the non-availability of work in urban centres which the rural migrants had hoped to find, as they had perceived that life in the urban centres was economically rewarding (Economists, 2007). As a result of lack of work, the migrants were then forced to seek alternative ventures and ended up living in inhumane conditions in squatter camps and shanty towns which were located mostly on the outskirts of the urban areas. These squatter areas or shanty towns became breeding grounds for crime and the practices of unsafe sex, which in turn burdened the whole urban area.

HIV/AIDS

Rural-urban migration had begun from the colonial times up to the present, and had been male dominated in Zambia. This scenario has had huge impacts on the economic structure of the household. Those males, for example, who returned to their rural dwellings having contracted HIV/AIDS while working

in the urban areas brought economic hardship to their families? Because, males were mostly breadwinners in rural areas, the household started to experience income shortages as the expenditures on the medical expenses increased and the income reduced substantially. This forced other members of the household, like children to give up school and became breadwinners and caregivers.

According to a study conducted by Haworth (1991) on the effects of AIDS upon the children in Zambia, he found that the illness of parents forced children to turn into caregivers, thereby sacrificing their education through poor attendance and simply dropped out of school. The study also found that the disease affected the productivity of the patient because it affected the household income adversely. The study also points out that one major consequence of a lack of income in the household especially in rural areas resulted in malnourishment of children and worsened when the children remained orphaned and were sent to a guardian's house.

Globalisation

The most recent cause of rural-urban migration in the few decades of post colonisation in, Zambia appears to have been globalisation and its effects on employment activities in many rural areas of Zambia and Africa in general. There is evidence, for example, in Zambia that globalisation and the policies of structural adjustment programme initiated by the World Bank and the IMF during Zambia's economic downturn period, have had a big effect on people's lives. For example, much of the rural public sector companies had been privatised in order to compete in the world market, thus forcing most of the people that lost their jobs during privatisation to migrate to urban areas and seek employment.

Rural governmental, agricultural and transport sectors like the United Bus of Zambia (UBZ) which were huge employers for much of the rural population, had to be privatised also in order to make them more efficient and competitive at the global level. Most of these companies, however, failed or went out of business as they could not compete with the cheap and subsidised products of the western world. Litchfield *et al*., (2003), argued that as a result of the privatisation of most of the state-owned firms, the poverty levels in the country as a whole worsened and being more pronounced in the rural areas. Therefore, the only alternative for most rural people was to migrate to the urban centres to seek work and permanent residence.

Case study 2: Ireland

Causes of Rural–urban migration in Ireland

Even though Zambia and Ireland were former British colonies, Ireland's rural-urban shift was very different from that of Zambia. Ireland's history of rural-urban migration derived mostly from; the years of the great famine, the British colonial rule and governance period, improvements in farming technology and the country's population boom.

During Colonial Rule and Governance period

A number of reasons behind the massive rural-urban migration during the great famine period in Ireland were attributed to the country's population being concentrated in the rural areas at the time, where they depended heavily on the potato as their staple food and agriculture as the major economic activity. When the potato crop failed as result of the *potato blight*, coupled with the selfishness of the British colonial masters refusing to feed the starving masses and instead exported food crops to England and other countries, forced the majority of the Irish rural population to migrate to the urban areas like Dublin and Cork, which then became stepping stones from where most people could migrate to foreign shores to seek food, work and a better lifestyle. O'Rourke (1995), recounted that the great famine of the 1840s ignited massive migration from the affected rural agricultural farmlands and from many other parts of the country to the urban areas and beyond, to places like the United States of America (USA) and the United Kingdom (UK) in search of better living conditions.

Another major cause of rural-urban migration in Ireland was the confiscation of land from the indigenous Irish people during the period of colonisation by the British Empire in the 16th and 17th Centuries. Therefore, many of the rural local people started either working for the newcomers or migrated to the urban centres to seek factory work. However, when the natives started rebelling against the British settlers at the turn of the 19th Century, the British landowners and many of the natives who had been oppressed also migrated to the urban areas like Cork in fear of their lives (Sheehan, 1986).

Post-Colonial Rule

Another aspect of Ireland's migration history, Meenan (1970) argued, was that in the years following the end of the Second World War, rural agricultural Ireland experienced massive economic changes mainly as a result of the mechanisation of farming methods. This resulted in large crop outputs but it

also came with the negative effect of hugely decreasing the number of farm jobs available. The mechanisation of farming severely affected the Irish rural population because most of the people depended on agricultural jobs as their main occupation, as it was the largest industry in many parts of rural Ireland at the time. This forced many people to migrate to the urban areas where there was employment in the commerce and manufacturing industries. Kennedy (1973), contended further that the number of rural seasonal agricultural laborers between the years 1946 and 1961 declined by 50 per cent because of the introduction of the more efficient agricultural machinery like the potato digger, and resulted in many settled as well as traveling communities who provided seasonal labour on the farms, to migrate to the urban areas like Dublin (Kennedy, 1973: 96).

Apart from the famine, colonial rule, land grabbing and farming advancements, other known causes of rural-urban migration were family based. A survey by the NESC in (1991) reported that Ireland in the 20th Century had an increase in the birth rate and argued that this could have put a lot of pressure on the availability of the farm labourers needed for a specific piece of work on family or other farms, and this then could have forced those that didn't have jobs to migrate in search of jobs in the urban areas. For example, if a farmer could only employ/support a certain number of workers/family on his farm as labourers, the excess people would have to move on to another farm or urban area for work.

Furthermore, the Central Statistical Office (2006) analysis of population change in Ireland during the period 1926-2006, found that rural–urban migration was accelerated as a result of huge economic decline in the rural areas and the country as a whole, and that the urge to move to the urban and work in the manufacturing industries was a common occurrence among many rural dwellers, especially the young peoples.

Effects of Rural-Urban Migration in Ireland

One of the main effects of Ireland's rural-urban migration includes:

Break in Family Social Bonds

Family bonds could have been altered as people migrated to the urban areas to work and sometimes to permanently settle there. For example, the census data of 2003, found that there was a 56 per cent decline in the population of the rural areas in Ireland as many people were commuting to the urban centres to seek better paid work and for permanent settlement. This was found as a

reason to have had a negative impact on the local rural communities in terms of the economic make-up because many of its young educated people who were seen as the future, left their rural places for a better life in the city. So, where previously families would have settled within a few miles of their close and extended families, they were now being permanently dispersed.

Re-establishment of Rural Roots

Even though rural-urban migration was always associated with a lack of basic things in the origin, and thus created push factors for people to migrate to the urban areas, Meredith (2007) and Walsh *et al.,* (2007), looking at trends in rural-urban and urban-rural migration, argued that even if people had left the rural areas during the economic decline in many rural places, they also returned to their social roots during the 'Celtic Tigers'(*Celtic Tiger* is a phrase that describes Ireland's massive economic boom in the period 1990-2008). Therefore, based on their arguments, rural-urban migration played an important role in implanting beliefs in people's mind to return to their traditional rural dwellings when the economic conditions became favourable for them to do so.

Summary

Having looked at the trends in rural-urban migration in the two case studies, it is evident to conclude that the causes and effects associated with the trends in Zambia were very different from those in Ireland. The reasons behind the differences, I believe, are several and include the fact that Zambia and Ireland are in two very different and completely separate geographical areas of the world. One is now a developed country surrounded by a largely developed continent while the other is a developing country in an undeveloped continent and hence faces different challenges and experienced different colonial injustices.

In Zambia, for example, it was found that the British colonial government initiated the male only migration to the urban mine industries and sent people back to their rural places after their retirement so that they were not under the colonial government's care after their work contracts expired. Further, post-colonial factors like land degradation, wage difference and globalisation were some of the push and pull factors which contributed greatly to the massive rural-urban migration which are being noted too in more recent times. The effects included urbanisation which was brought about as result of non-availability of work to cater for the migrants and thus forced them to set up homes in the slums.

In Ireland, however, rural-urban migration was first accelerated by the British Empire's land grabbing practices which forced those that no longer had land to farm to migrate to the urban area and seek work. Secondly, the *potato blight* which caused massive deaths partly as a result of a refusal by the colonial masters to provide food to the hungry which they instead exported, forcing thousands of people to move not only to urban areas but also overseas for a better life. The technological advances and introduction of more efficient farming techniques forced the unwanted labourers to migrate to the cities. Finally, the population boom also played a major part in rural-urban migration as there were fewer jobs on farms to provide work for everyone.

Conclusion

The arguments contained on the two case studies confirm and contradict the established classical sociological narratives on the theoretical discourses of rural-urban migration.

Many of the descriptions of the sways of rural-urban migration mentioned in the two case studies conform to the classical sociological thoughts about rural-urban migration. For example, the colonial tactics which were employed in Zambia in allowing only males to migrate to the urban areas, and work in the mines and repatriate them to their rural places after work and at retirement, reinforces Bourdieu's arguments about the Kabyle people. Bourdieu claimed that the rural people who had migrated to the urban areas retained their traditional beliefs and customs whenever they were exposed to the rigors of urban lifestyles. Durkheim further asserts that people would get adapted to the urban way of life at the same time retaining their traditional beliefs and social make-up, conforms to the ideas that the rural Zambian miners who come back after their retirement from the urban mine jobs still had a sense of rural belonging in them. This was also supported by the fact that returning miners from the Copperbelt of Zambia that had been exposed to the often better urban environments still managed to stay in the rural areas after employment rather than attempting to remain in the city even though it was now legal for them to live in the urban centres permanently if they chose to.

However, the behaviour of the miners that had returned to the rural areas in bad health having contracted sexually transmitted diseases such as HIV/AIDS seemed to conform to Simmel's and Tonnies's beliefs. Their arguments that the mental status of rural people, when exposed to the urban way of life, became distorted, was exemplified by migrants that came back to their rural homes who seemed to have lost the traditional rural morals and engaged in sexual activities which were not the common norm in their traditions as they

already had wives and families. Furthermore, Tonnies in this perspective would have concluded that the urban experience got rid of the established social and traditional norms of those that came back in bad health.

From an Irish perspective, however, Meredith's (2007) narratives on people returning to their traditional rural homes as a result of improved economic environments, unlike the Zambian experience, also conforms with Durkheim's assertions that people held on to their social beliefs and sense of belonging, and also with Bourdieu's studies of the Kabyle people in Algeria and how they retained their traditional social norms while they were living in the urban areas, that they never changed when they went back to their villages; reinforced the classical sociological theoretical thought about rural-urban migration.

From the Irish point of view, one could argue that people moved back to their rural homes and rural environment when it was financially viable again to live in the countryside, and had changed their method and standard of living from those of their previous generations, unlike in Zambia where village life had not largely changed for some decades. This can be attributed to the fact that Ireland is now a developed country whilst Zambia is still on the pathway towards development.

Lastly, it is evident that classical sociological narratives about rural-urban migration shift conforms to the opposing views outlined above about the mental impact on migrants as a result of a shift from the rural-urban. It is apparent that when people move from rural to urban areas or when the rural has been replaced by the urban, morals of people are sometimes maintained and sometimes over-run by the rigors of city life which distort traditional beliefs and shakes the mental make-up of people.

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CHAPTER 11

Book Review: An Introduction to Educational Administration

Charles Mpasa Makwaya

Introduction

This book has one hundred and forty pages divided into twelve chapters. In the twelve chapters, the author (Alfred Kakanda) has ably responded to the objectives for writing the book. These are important to highlight so that when the reader is done with the book, the reader may gauge how successful the author has been in attaining his goal. The following are the objectives the author set himself for writing the book:

1. Should be directed at teachers and lecturers in the Southern African Development Community (SADC) who hold posts with managerial responsibilities in schools, colleges and universities.
2. Should look toward administrative skills and attributes of a school, colleges and university staff and the ways in which these can be developed.
3. Should provide a theoretical framework of management thinking as it could be applied to schools, colleges and universities.
4. Should give a simple administrative analysis of the practice of educational administration in the SADC region.
5. Should be designed as a teaching-learning book that may enable teacher educators in schools at colleges of education and universities to prepare educational administrators effectively.

Issues Discussed

The author achieves his objectives by identifying theories that emerged and developed as a response to the problems the industrial organisations were grappling with from early twentieth century. These theories provided ideas and principles to guide the structuring and management of organisations. He then proceeds to delineate from these theories and the practices they

influenced, which is relevant to the management and administration of educational institutions.

To achieve the stated objectives, the author dealt with central ideas in twelve chapters as discussed below:

In Chapter 1 the book provides the genesis of management thinking in the early twentieth century. It begins by exploring the development of classical theories, whose principles and concepts provided guidance in structuring and managing industrial organisations. The first to come under spotlight is Scientific Management advocated by Frederick Winslow Taylor (1856–1915). Taylor formulated what he called, 'principles of scientific management,'. The principles were anchored on two concepts: first, an explanation of why people participate in organisations and second, differentiating between various levels of authority. In practice, it was expected that all production activities were to be broken down into their constituent elements and that workers should be trained to carryout each task. To ensure compliance, workers were to be monitored continuously in case of breakdowns in the system.

Taylor's work was criticised, the author writes, for dehumanising and exploiting workers caused by the focus on engineering jobs to rigid performance standards. In so doing, critics pointed out, Taylor's approach ignored the importance of psychological and sociological factors in motivating persons to do their job better.

In his continued efforts to explore the classical theories landscape, the author identifies Henri Fayol (1841–1945) as the other influential figure among advocates of classical theories. Fayol is recognised for developing a comprehensive list of administrative management principles. The principles were seen as the basis for organising the manager's work. The metaphor which dominates this view of management is that of management as a machine. From this perspective, it was expected that workers would accept Fayol's administrative management on account of their desire to earn money.

Like Taylor, before him, Fayol's emphasis on man as an economic entity whose compliance could be secured by his need for money was criticised. It was criticised for failure to take account of psychological and sociological factors such as self-esteem, self–expression and need for security.

Although the author highlights criticisms of classical theories, he points out that there are a number of ideas and practices rooted in classical management thinking that are applicable to the management and administration of educational institutions. He says, 'Today we generally recognise and use five functions of management drawn from Fayol's original list of administrative management principles. These are:

1. Planning the work of the organisation;
2. Organising the workforce so that it can perform in the best way possible;

3. Co-ordinating the work of those responsible for the different elements of the work process;
4. Giving command to ensure that things are done properly; and
5. Controlling the work in accordance with the stipulated laid down rules.

At this point, the author begins to identify the relevant aspects of classical theories in today's practice of management and administration. The author explains that out of the criticism of classical theories grew the human relations approach movement to administration. This approach, in contrast to the classical theories which highlighted the economic man view of motivation, emphasised human beings as members of groups, with more intangible motives than the desire for money. These motives included self-esteem, security and self- expression. The central theme in this approach was that of improving workers' satisfaction with their jobs which could improve company performance. Prominent names in the movement were Mary Parker Follet (1863–1933), George Elton Mayo (1880–1949) and Chester Bernard (1886–1961).

Before closing Chapter One, the author's steady move from theory to practical application makes a distinction between administration and management. He also looks at the school as a bureaucratic organisation and the different roles members of management and school staff may play in the running of the school.

By discussing administration and management, and school as a bureaucratic organisation, the author demonstrates how the mix of theories discussed earlier feed into the practical application of management thinking drawn from them into educational administration.

In Chapter 2, the writer explores the concept of a school as a social system. He quotes two authorities who shed light on what a social system is. One of these authorities, Olsen (1968), defines a social system as a model of organisation that possess a distinctive total unity beyond its component parts; it is distinguished from its environment by clearly defined boundary; it is composed of sub-units, elements and sub-systems that are interrelated within relatively stable patterns of social order. The author then goes on to demonstrate how a school fits in the parameters of the definition. In doing this, he prepares the mind of the reader and learner to understand the concept of leadership and management from the perspective of a social system. Indeed, conceptualising an educational institution as a social system builds on the management thinking explored in Chapter 1.

In Chapter 3, the book defines both concepts, leadership and management and makes a distinction between the two. The focus on the theories of leadership and the guidance on how these could be applied in educational administration, demonstrates the author's consistency in marrying theory and practice in educational administration.

Chapter 4, explores the concept of communication. The concept is defined and its functions in an organisation identified. Further, the author moves on by focusing on the practical application of communication in an organisation, in particular, a learning institution like a school. The author shows the importance he attaches to keeping theory and practice side by side. Communication, he emphasises, can aid administration in schools, colleges and universities.

Chapter 5 takes up the important theme of decision making. The concept is defined showing logical steps that may be followed in making decisions. Further, the Chapter looks at types of decisions and the problems that often occur in decision-making. A look at the theme of decision-making coming after the concepts of communication, leadership and management, in particular, reveals that the author is narrowing his focus as he moves towards more practical steps and strategies for running an institution. It is like moving from the top of a funnel in Chapter 1 and cascading towards the bottom in chapter 12.

In Chapters 6, 7, 8, 9 and 11, the book deals with aspects of administration that are directly related to the running of schools and other educational institutions. These are effective meetings, delegation within the school, induction, classroom management and financial management in education. These topics are linked to the functions of management dealt with in chapter 1 The Chapter on effective meetings is linked to the function of communication. Meetings are one way of communicating within a school. Delegation in Chapter 7 is linked to control. Delegation is a means of control that a school manager may use when found appropriate. Induction, classroom management and financial control are all linked to co-ordination and control functions. This is another demonstration of how the book ties theories to practical activities in learning institutions. This is important because it allows the learner to use it for learning and as a manual or reference book for administration. At this point, objective four is clearly fulfilled.

Chapter 10 gives insights into the new concepts of headship, while Chapter 12 the last chapter, looks at the theme of school and community. The two topics provide the user with a microscope to look beyond the here and now. The user is being told to look to the future and to broaden the conceptual framework for understanding educational administration.

Strengths of the Book

The writer should be commended for keeping theory and practice side by side throughout the book. This is important because it has enabled him to achieve the objective of allowing those the book is written for to simultaneously learn and practice.

Another strength of the book is the definition of key concepts in the context of the theoretical framework and educational administration. This approach enhances understanding of the applicability of theory to administration and management.

To be commended too is the distinction made between management and administration, and leadership and management. This is important because it gives stakeholders understanding of what to expect from each player in educational administration.

Weaknesses of the Book

The inclusion of the University and its administrators appears uncomfortable. This is because it is mentioned only sparingly, while schools and colleges have received the most attention from the author.

Conclusion

The need for training educational managers in the SADC region has existed for some time. And, this book answers the question on the need for resource materials.

The author should be commended for demonstrating how theories of management, administration and leadership can be applied in running educational institutions. By defining key concepts in leading and managing schools, colleges and universities, the book provides the necessary understanding of pertinent issues that define educational administration. In doing this, the author has lived up to his promise that he was writing the book for administrators, teacher trainers and students. This is a good read for all interested in issues to do with management, administration and leadership of organisations, and in particular, educational institutions.

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